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PRODUCT AND SERVICE USERS

Average Weekday and Sunday/ Weekend Newspaper Coverage

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921-5080

PRODUCT AND SERVICE USERS:

AVERAGE WEEKDAY AND SUNDAY/WEEKEND

NEWSPAPER COVERAGE

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

September 1987

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

INTRODUCTION

How to Read the Tables

The tables presented in this report are derived from a special tabulation of the Simmons Market Research Bureau's 1986 Study of Media and Markets.

Each table shows the level of product or service usage for the category described and average single-issue coverage of the daily and Sunday/weekend newspaper among those users, both for the total United States and for all metropolitan areas.

For example, the first line of figures in the table headed "Men's Apparel" (p. 3) shows that 6.4% of all men report that they have bought an overcoat or topcoat within the last twelve months. On an average weekday, the daily newspaper reaches 69% of these buyers. On an average weekend, the Sunday newspaper reaches 71%. For all Metropolitan Statistical Areas, the average reach of the daily newspaper among buyers is 74%, and the average Sunday/weekend reach is 73%.

CONTENTS

Page

Introduction iii

Alcoholic Beverages: Distilled Spirits 1

Alcoholic Beverages: Malt Beverages and Wines 2

Men's Apparel 3

Women's Apparel 5

Appliances (Household) 7

Automobiles 8

Automotive Products and Services 8

Automotive: Gasoline, Oil, Anti-Freeze and Car Rentals 9

Beverages: Carbonated Soft Drinks, Coffee, Tea and Juices . . 10

Cameras, Binoculars, Projectors and Film Processing 11

Dinnerware, Flatware 12

Draperies, Curtains, Towels, Linens 13

Electronics: Stereo, Telephones, Calculators, Typewriters . . 14

Fast Food, Drive-In, Family and Steak House Restaurants 15

Finance: Banking and Investments 16

Finance: Credit Cards and Securities 17

Finance: Insurance 18

Food: Grocery Expenditures and Cents-Off Coupons 19

Food: Cereals, Vegetables, Rice, Fruits, Pasta and Pizzas . . 20

Food: Snacks and Crackers 20

Food: Dairy Products, Spreads, Cookies and Desserts 21

Food: Soups, Meat, Fish, Dressings and Condiments 22

Furniture, Carpeting and Floor Tile 23

Health Care Products, Oral Hygiene Products,
Over-the-Counter Remedies 24

Page
Home Improvements 25

Household Supplies: Soaps, Detergents, Cleaners, Deodorizers and Paper Products 26

Jewelry and Luggage 27

Leisure Activities 28

Pet Ownership, Pet Food Usage 29

Power Equipment and Tools 30

Public Activities 31

Ownership of Recreational Items 32

Ownership of Sporting Goods 32

Sports, Physical Fitness Programs and Outdoor Activities . . . 33

Television Equipment and Services 34

Tobacco: Cigarettes, Cigars and Pipes 35

Toiletries: Beauty Aids, Cosmetics and Personal Products . . . 36

Toiletries: Hair Care, Skin Care and Shaving Products 37

Travel: Domestic Travel (Trips of 100 Miles or More One Way) . 38

Travel: Foreign Travel 39

ALCOHOLIC BEVERAGES: DISTILLED SPIRITS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Drink any distilled liquor (net)	50.9%	66%	69%	69%	74%
Drink any whiskey (subnet)	30.9	68	70	70	75
Bourbon	15.8	67	69	70	74
Canadian	17.2	67	69	70	75
Rye or blends	8.9	67	71	69	76
Scotch	11.3	70	73	71	76
Drink other distilled liquors (subnet)	45.7	66	70	69	74
Gin	15.8	69	72	71	76
Rum	20.4	65	68	68	73
Tequila	12.7	62	67	64	72
Vodka	24.9	67	71	69	75
Cordials or liqueurs	20.4	68	72	70	77
Brandy or cognac	13.4	68	71	70	75

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

ALCOHOLIC BEVERAGES: MALT BEVERAGES AND WINES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Drink any malt-based beverage (net)	47.6%	65%	67%	68%	72%
Drink any beer (subnet)	46.4	65	67	68	72
Light/low calorie domestic beer (in cans or bottles)	25.2	66	69	70	74
Regular domestic beer (in cans or bottles)	35.9	64	67	68	72
Regular imported beer (in cans or bottles)	15.4	68	71	70	75
Ale (domestic or imported)	7.6	69	71	70	75
Malt liquor	7.6	58	60	62	66
Drink any wine (net)	48.9	67	70	69	74
Champagne, cold duck and sparkling wines	25.0	69	72	70	76
Domestic dinner/table wine	28.6	70	74	71	77
Imported dinner/table wine	17.5	69	75	71	78
Aperitif and specialty wines	8.6	69	73	71	77
Sangria/pop/party wines	11.2	63	67	66	73
Reduced calorie domestic dinner/table wines	3.6	66	69	66	71
Port, sherry and dessert wines	13.5	70	73	71	76
Vermouth	5.2	70	75	72	78
Wine Coolers	21.9	63	66	66	71
Decision maker for brands of wine or liquor served in home	37.3	68	70	70	75

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets

MEN'S APPAREL
(Total Men)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Bought in last 12 months:					
Any overcoat or topcoat	6.4%	69%	71%	74%	73%
Usually spend $100 or more	3.3	68	73	75	76
Any raincoat or all-weather coat	5.3	75	76	77	79
Usually spend $50 or more	3.6	74	78	80	82
Any winter or all-year suit	11.2	73	75	73	77
Usually spend $200 or more	3.1	77	81	77	82
Any lightweight summer suit	6.3	73	72	72	75
Usually spend $150 or more	2.0	76	76	75	78
Any sport coat or blazer	13.3	74	75	76	78
Usually spend $100 or more	5.7	74	80	74	82
Any heavyweight jacket (not suit type)	10.1	65	68	67	73
Usually spend $50 or more	5.9	67	72	69	76
Any lightweight jacket (not suit type)	13.6	70	68	74	73
Usually spend $25 or more	7.7	74	70	78	76
Any slacks (business, dress)	22.6	74	73	75	76
Usually spend $30 or more	6.8	76	74	76	76
Any dressy, designer jeans	8.7	69	69	72	73
Usually spend $30 or more	2.7	71	68	75	74
Any other jeans	27.4	65	66	68	72
Any regular or dress shirt	26.7	71	71	72	75
Usually spend $25 or more	6.2	69	70	70	72
Any sport shirt	19.3	71	72	73	77
Usually spend $25 or more	3.6	77	77	78	81
Any sweater	13.6	72	71	72	74
Usually spend $30 or more	3.2	72	75	75	79

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

MEN'S APPAREL (continued)
(Total Males)

	Percent of Total Population	Total U.S. Daily	Total U.S. Sunday	All Metros Daily	All Metros Sunday
Bought in last 12 months:					
Any leather shoes	31.9%	71%	71%	74%	76%
Usually spend $50 or more	13.2	75	75	76	78
Any hiking/climbing boots	3.8	67	70	70	76
Any western/cowboy boots	7.0	61	62	63	68
Any other leather boots	7.4	63	63	67	71
Any sneakers	21.3	66	69	69	73
Usually spend $30 or more	6.6	68	71	70	74
Any canvas shoes	6.8	67	71	70	76
Ski clothes (not boots)	3.0	67	68	70	74
Any swim suit	7.7	72	73	73	76
Any tennis clothing	1.9	74	74	74	76
Any warm-up suit	6.3	71	72	72	75

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

WOMEN'S APPAREL
(Total women)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Bought in last 12 months:					
Blazer or jacket	22.2%	66%	70%	68%	74%
Usually spend $50 or more	7.5	69	76	71	78
One or more cloth coats	15.9	65	69	68	74
Usually spend $75 or more	6.6	70	73	71	75
One or more raincoats/ all-weather coats	9.7	66	72	68	76
Usually spend $75 or more	2.3	75	78	76	81
One or more dresses	38.8	66	68	68	73
Usually spend $50 or more	12.7	71	74	72	78
One or more pantsuits	8.7	67	66	69	70
Usually spend $35 or more	5.3	71	69	72	72
Skirt suit (two-piece)	11.7	66	70	68	71
Usually spend $75 or more	4.2	72	74	74	78
One or more blouses/shirts	42.4	66	69	68	74
Usually spend $35 or more	10.2	68	71	68	77
One or more skirts	27.4	65	70	68	73
Usually spend $35 or more	3.7	69	74	72	78
Slacks	38.9	66	69	68	74
Usually spend $25 or more	11.7	65	72	66	75
Dressy/designer jeans	17.7	62	68	65	73
Usually spend $35 or more	3.3	61	73	62	76
Other jeans	26.9	61	66	64	72
Usually spend $25 or more	6.7	63	69	65	74
Sweaters	36.3	66	70	68	75
Usually spend $25 or more	13.0	67	74	68	77
One or more T-shirts	19.5	59	66	62	71
Usually spend $15 or more	4.7	62	68	66	74

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

WOMEN'S APPAREL (Continued)
(Total women)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Bought in last 12 months:					
Any leather shoes	53.4%	64%	68%	66%	73%
Usually spend $35 or more	21.7	68	71	70	75
Any leather boots	13.8	60	65	64	71
Usually spend $75 or more	2.5	62	69	69	74
Slippers	14.9	67	69	68	73
Any sneakers	27.5	64	69	67	75
Usually spend $35 or more	8.7	67	72	73	76
Any canvas shoes	14.2	64	66	65	70
Any brassieres	46.6	65	68	67	72
Usually spend $15 or more	12.6	69	72	69	75
Any girdles	7.1	70	69	73	75
Any slips	18.5	66	69	68	75
Usually spend $15 or more	4.1	69	70	71	74
Any regular panty hose	39.3	63	66	66	71
Any control-top panty house	20.0	66	71	68	75
Any support panty hose	11.9	65	70	66	74
Any regular stockings or hose	5.8	65	68	66	69
Knee-high hose (not socks)	30.7	66	70	69	75
Socks	25.6	62	66	66	71
Panty-top panty hose	8.2	62	66	66	72
Swimsuit	20.2	64	70	66	76
Usually spend $35 or more	3.7	69	76	70	78
Warm-up suit	17.4	63	71	65	75
Usually spend $25 or more	8.0	67	75	66	76

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

APPLIANCES (HOUSEHOLD)
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Bought in last 12 months:					
Automatic washing machine	5.8%	62%	66%	67%	74%
Separate electric clothes dryer	3.3	59	62	65	70
Vacuum cleaner	5.8	63	65	69	74
Portable room heater	2.4	65	66	67	71
Ceiling fan	5.7	68	71	73	78
Smoke/fire detector	3.3	70	73	74	79
Electric refrigerator	5.2	61	67	65	73
Automatic dishwasher: built-in	1.7	66	71	68	77
Electric stove or range	1.9	68	67	74	73
Electric can opener	3.1	67	72	73	79
Electric blender	1.5	63	63	64	67
Electric food processor	1.7	68	70	73	78
Automatic drip coffee maker	4.4	65	66	67	72

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

AUTOMOBILES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Have current driver's license	82.1%	65%	66%	68%	72%
Own any cars	80.5	65	67	68	72
Decision maker for:					
Any car bought new	25.9	71	73	68	73
One car bought new	22.9	70	72	67	71
Two or more bought new	3.0	78	79	73	77
Domestic car bought new	20.1	72	73	74	77
Sub-compact	3.1	66	75	68	78
Compact	3.5	74	72	76	78
Intermediate	6.2	74	74	75	78
Standard	2.9	75	76	77	80
Luxury	1.3	74	76	76	79
Foreign, import bought new	5.7	69	72	70	76
Car bought new in last two years	12.7	72	73	74	78

AUTOMOTIVE PRODUCTS AND SERVICES
(Total Adults)

	Percent of Total Population	Total U.S. Daily	Total U.S. Sunday	All Metros Daily	All Metros Sunday
Bought or installed in last 12 months:					
New tires for passenger cars	39.3%	66%	68%	69%	73%
Four or more tires	24.8	66	68	64	72
One to three tires	14.5	66	68	66	70
Car batteries	25.1	64	66	68	71
Mufflers	17.4	66	68	69	74
Spark plugs	38.5	64	66	67	72
Shock absorbers	10.9	66	68	69	74
Air filters	48.6	66	68	69	73
Oil filters	51.5	65	67	70	73
Had transmission serviced	11.7	64	67	67	72

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

AUTOMOTIVE: GASOLINE, OIL, ANTI-FREEZE AND CAR RENTALS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Gasoline, diesel fuel usage per week					
20 or more gallons	22.1%	64%	66%	67%	72%
10 to 19 gallons	35.9	66	68	70	74
9 gallons or less	20.0	63	64	66	71
Buy premium leaded	3.3	67	68	69	73
Buy premium unleaded	22.3	68	71	71	76
Buy regular leaded	20.8	60	61	64	68
Buy regular unleaded	48.1	66	68	69	73
Buy motor oil	63.1	63	65	67	72
Buy gasoline additives	15.2	64	65	67	71
Buy motor oil additives	6.6	60	63	65	70
Buy anti-freeze	55.8	63	65	67	72
Use car wax, polish	43.6	66	67	69	74
Car rentals					
Rent car for personal or business reasons	8.3%	72%	76%	73%	79%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

BEVERAGES: CARBONATED SOFT DRINKS, COFFEE, TEA AND JUICES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Personally drink (total adults):					
Regular cola (not diet)	62.8%	61%	63%	65%	69%
Diet or low-calorie cola	41.3	65	67	69	73
Other regular carbonated soft drinks	52.2	63	64	66	70
Other diet, low-calorie carbonated soft drinks	33.5	65	66	67	72
Use in household (female homemakers)					
Ground coffee (net):	58.6%	65%	68%	67%	73%
Regular (not decaffeinated)	49.2	64	68	67	73
Decaffeinated	23.6	66	68	69	74
Instant or freeze-dried coffee:					
Regular (not decaffeinated)	28.5	63	66	66	72
Decaffeinated	34.5	66	67	68	72
International flavored instant	12.8	65	70	66	74
Regular tea	70.1	64	66	66	72
Instant tea (unsweetened)	25.8	65	68	69	73
Instant iced tea mix	20.2	67	71	69	75
Frozen orange juice	59.0	65	67	67	72
Orange juice in cans, bottles or cartons	47.8	62	65	65	71
Tomato, vegetable juices	48.0	65	67	68	73
Herbal tea (bags or packages)	29.3	64	67	66	71
Bottled natural spring or mineral water	13.5	65	68	68	71

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

CAMERAS, BINOCULARS, PROJECTORS AND FILM PROCESSING
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Bought still camera in last 12 months	17.8%	67%	68%	70%	73%
Spent $100 or more	5.7	72	73	74	77
Movie camera ever bought	6.4	74	74	75	78
Binoculars, field glasses ever bought	10.8	73	73	75	78
Movie projector ever bought	6.0	73	74	75	78
Slide projector ever bought	5.2	75	76	76	79
Send or take out film for processing (net)	51.2	66	68	69	74
Use drug store	22.6	66	68	69	74
Use food store	6.0	67	72	70	76
Use camera store	6.6	69	72	70	76
Use mail order	5.6	65	69	68	76
Use discount store	9.2	65	67	68	73
Use department store	4.3	63	64	67	71
Use photo drive-in	5.9	67	70	67	72
Use 1-hour photo lab	6.8	67	71	69	76

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

DINNERWARE, FLATWARE
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Bought in last 12 months:					
Sterling silver flatware	2.0%	61%	66%	65%	73%
Stainless steel flatware	5.4	66	68	68	72
Crystal	5.0	70	71	72	74
Glassware (not crystal)	6.2	64	66	69	73
Fine china	2.6	69	71	69	73
Everyday china	3.8	71	73	72	77
Stoneware dinnerware	4.4	67	69	73	76
Other dinnerware	3.5	61	63	64	68

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

DRAPERIES, CURTAINS, TOWELS, LINENS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Bought in last 12 months:					
Ready-made draperies, curtains	8.9%	67%	69%	70%	74%
Spent $50 or more	5.4	72	75	74	80
Custom draperies, curtains	2.9	72	73	73	76
Spent $250 or more	1.4	77	78	77	78
Window shades/blinds	10.0	67	71	70	75
Spent $50 or more	4.4	72	76	73	78
Towels	25.9	67	68	69	73
Spent $25 or more	11.3	71	74	73	77
Sheets, pillowcases	26.8	66	70	69	75
Spent $25 or more	15.3	69	73	71	77
Comforters, quilts	10.3	66	70	68	76
Spent $50 or more	4.4	69	74	70	79
Electric blankets	5.0	68	66	70	73
Spent $50 or more	1.5	76	74	77	77
Other blankets	7.0	66	68	69	74
Spent $25 or more	3.4	67	73	69	76
Tablecloths and napkins	13.4	68	71	69	75
Spent $25 or more	4.6	74	77	75	78

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

ELECTRONICS: STEREO, TELEPHONES, CALCULATORS, TYPEWRITERS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Ever bought:					
Compact or console stereo	14.1%	69%	69%	71%	74%
Portable walkabout radio/player	10.2	67	71	71	76
Separate components when purchased:					
Stereo receiver/tuner/amplifier	11.1	67	69	69	72
Separate stereo tuner	5.7	69	72	70	75
Separate stereo amplifier	5.3	68	71	70	75
Stereo speaker(s)	11.3	67	72	70	76
Turntable	11.2	69	72	71	76
Cassette deck	8.3	66	71	69	75
CD player	2.0	73	74	75	76
Telephones ever bought:					
Cordless telephone	8.1	68	73	71	77
Telephone from company store	10.2	65	67	68	71
Telephone from retail store	15.3	66	70	69	75
Telephone answering machine	4.8	67	72	68	76
Bought in last 12 months:					
Pocket programmable calculator	13.1	65	67	67	71
Pocket non-programmable calculator	13.5	67	70	69	75
Desk top calculator	6.2	66	70	67	74
Electric portable typewriter	2.2	71	76	73	81
Own home, personal computer:	10.7	68	72	70	76
Software bought in past 12 months:					
1 to 3 programs	3.4	68	70	68	72
4 or more programs	2.1	71	77	71	80

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

FAST FOOD, DRIVE-IN, FAMILY AND STEAK HOUSE RESTAURANTS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
All users	86.1%	64%	65%	67%	71%
Number of times past 30 days:					
Heavy (10 or more times)	28.4	66	68	69	73
Medium (4 to 9 times)	30.1	65	66	67	71
Light (3 times or less)	27.6	62	62	66	69
Types visited:					
Cafeteria	16.8	66	68	71	77
Fast food, drive-in	64.9	63	65	71	76
Family restaurant	44.2	66	67	68	74
Steak house	27.8	67	68	70	73
Theme restaurant	10.0	67	71	68	76
Other restaurants	18.8	67	69	69	75
Chains or franchises visited:					
Arby's	15.0	66	69	68	73
Big Boy	10.6	67	67	68	71
Bonanza	10.1	67	67	70	73
Burger King	41.9	64	67	67	72
Dairy Queen	17.5	64	64	67	71
Denny's	13.3	68	72	69	74
Dunkin' Donuts	9.1	68	72	70	74
Domino's Pizza	9.2	65	67	66	71
Hardee	17.3	62	61	67	70
Kentucky Fried Chicken	29.1	62	64	65	70
Long John Silver	13.0	63	64	66	72
McDonald's	53.8	64	66	67	71
Pizza Hut	28.8	64	66	67	73
Ponderosa Steak House	12.2	70	72	70	76
Red Lobster Inns	13.8	68	71	70	76
Sizzler Family Steak House	10.9	65	67	67	71
Taco Bell	17.8	61	66	63	70
Wendy's Old Fashioned Hamburgers	27.5	66	68	69	73

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

FINANCE: BANKING AND INVESTMENTS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Have account at commercial bank:					
Non-interest checking account	30.4%	67%	68%	69%	74%
Interest bearing checking account	15.1	70	71	72	75
Savings account	23.9	68	69	70	75
Six-month savings certificates or CDs	5.3	72	71	74	77
Long-term savings certificates	5.4	72	73	73	78
Insured money market account	5.5	74	74	74	78
Line of credit account	5.6	70	73	72	78
Auto loan	7.5	70	72	71	79
First mortgage	5.5	67	70	71	77
Personal loan	7.5	66	68	69	74
Have account at savings bank or savings and loan association:					
Non-interest checking account	6.6	65	67	67	72
Interest bearing checking account	9.8	71	74	72	76
Savings account	18.7	71	72	73	76
Six-month savings certificates or CDs	5.2	74	73	75	76
Long-term savings certificates	6.8	75	73	76	78
Insured money market account	4.8	75	75	76	79
First mortgage	9.3	75	77	76	80
IRA	18.4	74	76	75	79
Automatic teller card	9.9	72	76	72	78

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

FINANCE: CREDIT CARDS AND SECURITIES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Own any credit cards:	57.9%	70%	72%	71%	76%
And used any last 3 months	37.3	71	74	73	77
And used any last 30 days	30.7	74	75	73	78
Card(s) owned:					
Gasoline credit card	19.7	73	76	75	79
Telephone credit card	11.9	72	75	73	79
American Express (green)	5.7	72	78	72	78
MasterCard	21.7	73	76	74	78
Visa	26.3	73	76	74	78
Other bank credit cards	2.3	71	70	75	75
J. C. Penney	22.1	72	74	73	78
Montgomery Ward	10.7	68	73	69	77
Sears	29.2	71	74	72	78
Other department store credit cards	23.7	73	78	74	80
Total value of self-purchased securities:					
Under $10,000	15.1	71	72	73	77
$10,000 or more	12.0	75	76	76	79
Have account with stockbroker, brokerage firm	7.6	76	81	77	83
Money market funds at a bank	7.1	76	75	76	80
Money market funds at brokerage firm	2.8	75	76	76	80

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

FINANCE: INSURANCE
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Have homeowners or tenant's insurance	55.7%	68%	69%	71%	75%
Less than $25,000	11.4	59	59	62	65
$25,000 - $49,999	12.9	66	65	70	72
$50,000 or more	31.4	72	75	74	79
Have medical, hospital or health insurance	70.2	66	67	69	73
Place of work or union	46.2	67	70	70	75
Through an agent	3.8	65	65	71	76
Direct from insurance company	5.8	68	67	72	76
Member of prepaid health care program	7.3	69	72	70	75
Have life insurance	58.3	66	68	70	74
Less than $10,000	19.2	63	63	68	70
$10,000 - $29,999	17.2	66	68	69	74
$30,000 or more	21.9	69	73	72	77
Have life insurance through an agent	11.9	67	70	71	77
Have vision care insurance	4.4	68	71	70	75
Have insurance against loss of income	4.2	71	71	75	78
Have dental insurance	10.6	69	73	72	78
Have personal liability insurance	5.3	70	72	73	77

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets

FOOD: GROCERY EXPENDITURES AND CENTS-OFF COUPONS
(Female Homemakers)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Any major food shopping last 4 weeks	75.5%	63%	65%	65%	70%
5 or more times	18.9	67	67	69	72
4 times	23.7	65	66	66	71
1-3 times	32.9	60	62	62	68
Amount spent in average week:					
$40 or less	27.9	56	56	58	62
$41 - $70	37.6	62	65	65	70
$71 or more	34.5	65	69	68	74
Use any cents-off coupons	65.4	65	69	68	74
Cents-off coupons from newspapers	52.7	67	71	69	75
Cents-off coupons from magazines	37.4	66	69	68	75
Cents-off coupons from mail	42.1	67	71	67	75
Cents-off coupons in/on packages	36.7	65	70	67	74

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets

FOOD: CEREALS, VEGETABLES, RICE, FRUITS, PASTA AND PIZZAS
(Female Homemakers)

Use in household:	Percent of Total Population	Total U.S. Daily	Total U.S. Sunday	All Metros Daily	All Metros Sunday
Any cold cereals	84.4%	62%	65%	65%	70%
Any hot cereals	64.5	63	65	66	71
Pork & beans/baked beans (in jars or cans)	71.1	62	64	65	70
Rice	80.3	63	65	65	70
Canned spaghetti and macaroni products	36.3	61	64	63	69
Frozen pizzas	49.8	63	65	66	72
Spaghetti sauce (in jars or cans)	61.6	63	67	66	72
Canned or jarred fruits	76.7	63	66	67	71
Frozen potato products	53.4	63	67	67	73
Frozen vegetables (not potatoes, corn on cob)	67.1	65	68	67	73
Mexican food & ingredients	45.7	61	65	63	69

FOOD: SNACKS AND CRACKERS

Saltines, flavored snack crackers, graham crackers	83.7	63	65	66	71
Potato chips	76.1	62	65	65	71
Corn and tortilla chips/snacks	58.6	62	65	66	71

Source: Simmons Market Research Bureau,
198 *Study of Media & Markets*

FOOD: DAIRY PRODUCTS, SPREADS, COOKIES AND DESSERTS

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
All Adults (Personally use):					
Frozen yogurt	13.3%	64%	66%	67%	70%
Yogurt (not frozen)	32.6	65	67	67	72
Female Homemakers (Use in household):					
Butter	58.0	61	64	64	70
Jams and jellies	82.3	62	65	65	71
Peanut butter	84.6	62	65	65	71
Cream cheese	60.8	66	68	68	72
Cottage cheese	60.6	65	66	67	71
Diet or low calorie American/ pasteurized process cheese	18.2	67	70	69	75
American/pasteurized process cheese (not diet)	71.7	63	66	66	72
Natural cheese (other than American)	54.3	64	68	66	72
Spread cheese	24.0	68	70	70	73
Margarine	78.5	62	65	65	70
Non-dairy cream substitute	23.7	64	65	68	72
Ice cream, ice milk, sherbet	84.3	62	65	63	70
Frozen dessert pies, cakes, pastries	35.3	66	69	70	75
Whipped topping (cream type)	60.8	64	63	67	72
Dry cake mixes	64.2	63	66	66	72
Flavored gelatin desserts	67.5	65	67	68	72
Frozen waffles	30.1	66	71	68	75

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

FOOD: SOUPS, MEAT, FISH, DRESSINGS AND CONDIMENTS
(Female Homemakers)

Use in household:	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Any dry soup/lunch mix or bouillon cubes	50.5%	66%	69%	68%	74%
Canned soup	83.3	62	65	65	70
Frozen main courses (casseroles or entrees)	35.8	65	69	67	73
Frozen complete dinners (TV dinners)	38.0	63	64	66	71
Frozen prepared seafood	35.9	65	69	67	74
Canned tuna	81.9	63	66	66	71
Complete package prepared dishes (with macaroni, noodles or spaghetti)	47.2	62	65	66	71
Unsliced ham (plastic wrap)	43.4	63	65	66	71
Frankfurters and wieners	78.3	62	64	65	70
Cold cuts (packaged or fresh-cut)	78.2	62	65	66	71
Pork sausages	59.7	62	65	65	71
Bacon	78.1	62	65	65	71
Mayonnaise or mayonnaise-type salad dressing	86.3	63	65	66	71
Liquid prepared salad dressing	72.7	64	66	67	72
Dry mix salad dressing	30.7	64	69	66	73
Salad or cooking oil (excluding olive oil)	83.7	63	66	66	72
Prepared barbecue or seasoning sauce	71.4	64	68	67	73
Catsup	86.2	62	65	65	70
Mustard	83.3	63	66	66	71

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

FURNITURE, CARPETING AND FLOOR TILE
(Total Adults)

Bought in last 12 months:	Percent of Total Population	Total U.S. Daily	Total U.S. Sunday	All Metros Daily	All Metros Sunday
Recliner chair	6.1%	67%	68%	71%	76%
Spent $250 or more	3.3	71	73	74	79
Sofa bed/convertible	3.7	65	69	68	74
Spent $250 or more	2.4	66	72	68	76
Other living room furniture	9.7	64	66	68	72
Spent $500 or more	4.6	68	71	73	77
Mattresses (excluding box springs)	4.5	63	67	68	73
Beds	8.7	67	67	69	74
Spent $250 or more	3.9	69	71	72	77
Other bedroom furniture	5.6	64	66	67	73
Spent $500 or more	2.2	66	70	68	78
Dining room furniture	4.8	65	68	67	73
Spent $500 or more	1.9	70	78	71	79
Lawn/porch furniture	6.0	68	71	71	76
Wall-to-wall carpeting/ room-size rugs	8.9	70	72	72	77
Vinyl flooring	4.4	69	69	71	75
Other flooring/tile	2.6	65	75	68	78

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

HEALTH CARE PRODUCTS, ORAL HYGIENE PRODUCTS, OVER-THE-COUNTER REMEDIES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Wear prescription eyeglasses	51.7%	67%	68%	70%	74%
Wear contact lenses	13.4	63	68	66	73
Use:					
Breath freshener	51.3	62	63	66	69
Denture cleansers	18.9	64	62	68	69
Mouthwash	62.2	63	63	67	70
Toothpaste	94.5	61	64	67	70
Use:					
Antibiotic creams & ointments	27.1	64	66	67	72
Topical antiseptics	36.8	65	66	68	72
Athlete's foot remedies	16.8	65	66	69	71
Cold and allergy remedies	62.7	63	65	67	71
Cough drops	39.7	63	65	68	72
Headache remedies, pain relievers	83.1	63	65	67	71
Indigestion aids, upset stomach remedies	55.2	63	64	67	70
Nasal sprays	18.5	66	66	68	72
Pain relieving rubs and liquids	36.5	63	63	67	69
Sore throat products	43.1	66	66	67	71
Vitamin capsules, tablets, liquids	46.7	66	68	69	72

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

HOME IMPROVEMENTS
(Total Adults)

	Percent of Total Population	Total U.S. Daily	Total U.S. Sunday	All Metros Daily	All Metros Sunday
In last 12 months:					
Had any rooms painted	27.0%	68%	71%	71%	75%
Interior wall paint:					
Latex or water base	22.4	69	71	72	76
Oil base	2.7	66	68	70	72
Had outside of house painted	13.5	70	72	72	76
Latex or water base paint	7.6	72	73	74	76
Oil base paint	3.5	71	73	73	76
Stain	1.5	66	69	70	78
Bought in last 12 months:					
Outdoor deck/porch/patio	2.0	72	74	74	79
Outdoor/exterior siding	1.6	65	69	70	78
Wall paneling	3.1	66	68	70	72
Roofing	4.2	67	70	71	75
Thermal windows	2.6	67	72	68	76
Wallpaper	10.2	69	72	72	77
Kitchen cabinets	2.5	67	69	71	74
Kitchen countertops	2.8	67	71	70	75
Kitchen sinks	2.4	67	70	71	75
Bathroom plumbing fixtures	6.1	70	73	72	78
Indoor lighting fixtures	6.8	72	73	75	79
Outdoor lighting fixtures	2.8	70	73	71	76
Hot water heater	4.8	65	68	68	74
Insulation for ceiling, floor or wall	4.1	68	71	70	76

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

HOUSEHOLD SUPPLIES: SOAPS, DETERGENTS, CLEANERS, DEODORIZERS AND PAPER PRODUCTS

(Female Homemakers)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Soaps and detergents for regular laundry	88.7%	62%	65%	65%	70%
Soaps and detergents for fine fabrics	53.5	66	69	68	73
Laundry boosters, pre-soaks and pre-cleaners	[illegible].4	65	68	67	74
Bleach	77.9	63	65	66	71
Fabric softeners	66.1	64	67	67	73
Automatic dishwashing detergent	35.3	69	74	71	78
Household cleaners (including kitchen and bath)	82.3	63	66	65	71
Oven cleaners	50.5	62	65	66	71
In-bowl toilet cleaners	49.1	63	66	66	71
Floor wax and polish	33.3	64	66	67	72
Furniture polish	76.2	64	67	67	72
Air freshener sprays and room deodorizers	57.7	64	66	67	71
Rug deodorizers and fresheners	33.7	62	65	65	71
Rug cleaners and shampoos	36.2	65	67	68	72
Facial tissues	77.9	64	67	66	72
Paper towels	86.4	62	66	65	71
Plastic garbage bags and trash can liners	59.8	62	66	66	72
Plastic type kitchen wraps	73.4	65	68	67	73
Aluminum foil	87.5	62	65	65	71

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

JEWELRY AND LUGGAGE
(Total Adults)

Bought in last 12 months:	Percent of Total Population	Total U.S. Daily	Total U.S. Sunday	All Metros Daily	All Metros Sunday
Men's new wristwatch (digital face)	7.6%	62%	62%	65%	67%
Women's new wristwatch (digital face)	5.8	62	62	65	68
Men's new wristwatch (dial face)	5.0	63	66	68	73
Women's new wristwatch (dial face)	6.6	70	70	73	75
Women's diamond ring	3.8	62	68	68	75
Gold jewelry (not filled or plated)	9.3	71	73	74	78
Other jewelry and gems (not costume)	5.4	69	73	72	78
Luggage or baggage	13.2	70	72	73	77
Spent less than $50	5.8	66	68	70	74
Spent $50 - $99	3.8	70	73	73	77
Spent $100 or more	3.6	76	77	78	82

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

LEISURE ACTIVITIES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Entertainment:					
Went to movies last 90 days	32.5%	66%	69%	68%	72%
Went to movies last 30 days					
Twice	7.5	66	71	68	73
Three or more times	8.7	64	67	66	69
Last 12 months, went to:					
Live theatre performance	12.4	74	76	74	78
Concert-classical	4.7	75	76	76	80
Concert-rock	12.0	65	68	66	72
Theater/concert once	7.8	66	70	68	73
Theater/concert 2-3 times	10.3	69	71	70	73
Theater/concert 4 or more times	9.1	69	71	72	76
Participation in last 12 months:					
Adult education courses	7.3	70	71	72	75
Card games	27.2	67	68	70	74
Coin collecting	3.5	68	71	72	78
Cooking for fun	26.5	65	69	68	74
Indoor gardening and plants	23.8	66	69	68	75
Needlework	14.9	65	68	68	74
Outdoor gardening	31.8	67	69	71	76
Painting, drawing, sculpting	6.5	65	67	68	72
Photography	11.6	69	73	72	77
Woodworking	7.3	69	70	72	76

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

PET OWNERSHIP, PET FOOD USAGE
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Own one or more dogs:	37.5%	63%	64%	67%	72%
Use canned dog food	16.3	66	66	68	72
Use packaged moist dog food	11.3	65	66	69	72
Packaged dry dog food	28.1	63	64	68	72
Dog biscuits or treats	22.3	67	69	70	74
Own one or more cats:	25.8	63	64	66	70
Canned cat food	13.0	65	67	67	71
Packaged moist cat food	9.6	64	67	67	72
Packaged dry cat food	17.1	64	66	67	72
Use flea and tick care products for dogs and cats	31.2	65	66	69	73

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets

POWER EQUIPMENT AND TOOLS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Items owned					
Garden tiller	10.1%	64%	62%	69%	71%
Garden tractor	4.2	66	64	72	71
Riding tractor-type lawn mower	9.7	66	65	70	74
Gas/walk-behind mower	30.3	68	69	72	76
Electric/walk-behind mower	3.6	69	72	70	74
Electric drill	32.1	69	70	72	76
Electric router	8.2	72	70	74	76
Gas chain saw	14.2	65	65	70	74
Electric chain saw	4.9	70	69	72	73
Portable electric circular saw	19.4	68	69	71	75
Portable electric jig/sabre saw	15.8	70	70	73	76
Stationary radial/arm saw	4.5	70	71	73	77
Bench/table circular saw	6.2	69	70	72	75
Stationary drill press	4.8	73	72	77	78
Stationary jig/sabre saw	2.5	69	72	73	77
Electric sander	16.5	70	72	73	77
Snow blower	7.7	75	76	77	80

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

PUBLIC ACTIVITIES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
In last 12 months:					
Voted in federal, state or local election	35.8%	71%	72%	73%	77%
Wrote to magazine or newspaper editor	4.7	69	70	72	74
Wrote or phoned radio or TV station	5.6	66	67	71	73
Wrote to elected official	5.3	73	77	75	80
Wrote something that was published	2.1	74	73	76	74
Visited elected offical	2.6	67	71	71	76
Addressed public meeting	4.0	76	77	76	80
Active in local civic issue	3.9	74	77	74	81
Worked for political party or candidate	1.8	75	78	75	82
Fund raising	5.7	72	74	75	79
Worked as a non-political volunteer	8.6	71	73	73	77
Memberships:					
Church board	5.8	68	67	69	71
Business clubs	3.1	72	73	73	77
Union	7.3	73	73	75	78
Fraternal orders	5.2	75	74	76	78
Religious clubs	2.9	77	79	79	81
Civic clubs	2.0	75	75	74	77
Veterans' clubs	4.1	73	69	77	74
Country club	2.5	72	70	75	74
Health club	5.0	69	74	71	77
Enviromentalist organization	1.5	74	75	76	77

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

OWNERSHIP OF RECREATIONAL ITEMS
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Canoe (not inflatable)	2.0%	69%	75%	71%	80%
Inflatable boat	2.5	68	70	72	74
Outboard power boat	4.3	69	70	71	75
Rowboat (not inflatable)	2.6	71	70	76	79
Towable trailer or camper	3.3	68	66	70	72
Swimming pool above ground	2.8	70	74	72	78
Swimming pool in ground	2.7	74	74	74	76

OWNERSHIP OF SPORTING GOODS
(Total Adults)

Bicycle	17.6%	67%	69%	70%	75%
Bowling ball	10.7	72	73	73	75
Fishing rod--fresh water	19.8	64	65	69	72
Fishing rod--salt water	6.9	67	68	69	72
Golf clubs--irons	9.7	75	77	77	80
Golf clubs--woods	9.3	75	77	77	80
Jogging or running shoes	12.2	68	74	70	77
Rifle for hunting	9.7	63	62	68	70
Shotgun for hunting	10.2	64	62	69	73
Target gun	3.4	69	70	71	75
(Snow) skis	5.4	68	74	70	78
Ski boots	4.7	68	74	70	77
Water skis	2.2	66	71	68	74
Tennis racquet	12.1	68	73	71	77
Tent/camping equipment	10.4	64	68	67	73
Stationary bicycle	6.5	73	77	75	80
Weightlifting equipment	7.0	69	73	70	77

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

SPORTS, PHYSICAL FITNESS PROGRAMS AND OUTDOOR ACTIVITIES
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Participated in last 12 months:					
Aerobics	8.2%	63%	69%	66%	75%
Bicycling	13.6	66	69	68	73
Bowling	17.3	67	69	69	73
Camping trips (overnight)	11.8	65	68	67	73
Fishing, fresh water	14.8	63	63	68	70
Fishing, salt water	4.8	66	67	68	73
Golf	11.5	72	73	75	77
Hiking	7.5	68	69	70	73
Hunting	7.9	60	59	68	69
Ice skating	2.9	69	76	74	79
Jogging	12.5	65	67	68	72
Physical fitness program in home	17.6	68	71	71	75
Physical fitness program out of home	14.9	66	70	68	74
Power boating	6.3	70	70	71	74
Racquet ball	5.6	65	70	69	74
Sailing	3.5	70	73	72	76
Skiing, downhill	4.2	68	71	69	73
Swimming	28.1	67	70	70	75
Tennis	8.7	67	70	69	74
Water skiing	4.1	65	70	67	72
Weight training	6.2	66	72	69	76

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

TELEVISION EQUIPMENT AND SERVICES
(Total Adults)

	Percent of Total Population	Total U.S. Daily	Total U.S. Sunday	All Metros Daily	All Metros Sunday
Currently Own:					
One TV set	33.4%	56%	56%	60%	63%
Two TV sets	36.8	65	66	68	72
Three or more TV sets	28.0	70	72	72	76
Video cassette recorder/player	28.1	68	71	70	75
Amount spent for TV set:					
Under $100	26.2	62	63	66	69
$100 - $299	47.3	64	66	67	72
$300 - $499	43.4	66	68	69	73
$500 & over	41.6	66	66	69	72
Type of TV set:					
B&W floor model	2.7	62	63	65	68
B&W table model	26.5	64	65	67	71
Color floor model	37.8	66	66	69	72
Color table model	58.8	66	68	69	73
Bought last 12 months:					
Any cassette tapes or discs	20.0	69	73	72	78
TV set	24.7	66	67	69	73
Blank VCR tape	19.0	70	74	72	78
Rented last 12 months:					
Any pre-recorded VCR tape	25.0	65	69	69	75
Subscribe to Cable TV	44.4	69	71	72	76

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

TOBACCO: CIGARETTES, CIGARS AND PIPES

	Percent of Total Population	Total U.S. Daily	Total U.S. Sunday	All Metros Daily	All Metros Sunday
Adults:					
Smoke cigarettes:	32.3%	61%	62%	65%	68%
Heavy user (30 or more per day)	5.8	63	64	65	70
Medium user (20 to 29 per day)	10.1	61	63	65	70
Light user (19 or less per day)	16.3	60	61	65	67
Smoke filter cigarettes	28.5	61	63	65	69
Smoke non-filter cigarettes	2.4	59	55	65	64
Smoke low tar cigarettes	19.5	62	64	66	70
Menthol filter:	11.3	60	61	64	67
100 mm or more	6.7	60	61	62	67
85 mm or less	5.6	60	59	65	65
Non-menthol filter:	19.9	62	63	66	70
100 mm or more	11.4	62	63	67	70
85 mm or less	10.6	59	62	64	68
Males:					
Smoke regular size cigars	3.2%	71%	67%	76%	75%
Smoke cigarillos, little cigars	1.9	64	64	62	67
Smoke pipe tobacco	3.3	65	69	68	76
Use chewing tobacco	5.5	56	54	68	69
Use snuff (smokeless tobacco)	3.5	59	52	66	63

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

TOILETRIES: BEAUTY AIDS, COSMETICS AND PERSONAL PRODUCTS
(Total Women)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Use:					
Blusher	64.8%	62%	66%	65%	71%
Eye liner	42.0	60	65	63	70
Eye shadow	55.9	61	66	64	71
Facial moisturizers	57.1	63	66	66	71
Foundation make-up	56.7	63	66	66	72
Lipstick or lip gloss	78.1	63	65	65	70
Mascara	58.2	61	65	64	71
Nail polish	61.7	62	66	65	71
Loose face powder	24.4	64	65	67	70
Pressed face powder	27.1	64	67	66	71
Cologne	60.1	64	67	67	72
Perfume	46.7	58	62	61	67
Toilet water	7.4	67	69	69	72
Feminine hygiene douches	34.5	58	62	61	68
Sanitary pads or napkins	20.2	56	61	61	68
Tampons	36.4	59	65	61	70

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

TOILETRIES: HAIR CARE, SKIN CARE AND SHAVING PRODUCTS

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Total Adults:					
Hand and body cream, lotion or oil	68.1%	63%	64%	66%	70%
Medicated skin care products	33.8	62	64	65	70
Deodorants or anti-perspirants	91.8	63	65	67	71
Shampoo	90.5	63	64	66	70
Creme hair rinse, conditioners	53.0	61	63	64	69
Hair sprays	43.1	63	64	66	70
Disposable razors	48.9	62	65	66	71
Electric and battery shavers	22.4	67	67	70	72
Razor blades	38.9	63	65	66	71
Shaving cream or gel	41.2	64	66	68	72
Men:					
After-shave lotion or cologne	49.8	67	66	70	72
Hair tonic or dressing	21.3	66	65	71	73
Women:					
Cleansing creams or lotions	56.0	63	66	65	71
Depilatories	16.8	62	66	64	70

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

TRAVEL: DOMESTIC TRAVEL (TRIPS OF 100 MILES OR MORE ONE WAY)

(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Took one or more trips last 12 months:	50.3%	69%	70%	71%	75%
One trip	16.1	67	68	71	75
Two-three trips	17.3	69	71	70	75
Four or more trips	16.8	70	71	73	77
Reason for trips:					
Business for self	8.1	71	73	73	78
Vacation	30.8	70	71	72	76
Personal (not vacation)	20.5	67	69	70	75
Number of airline round trips:					
One	9.1	69	72	71	74
Two	3.9	71	76	72	79
Three or more	4.3	76	78	77	81
Traveled by scheduled plane	16.4	71	74	73	77
Traveled by charter plane	1.8	71	75	73	78
Stayed at any hotel/motel	42.8	69	70	73	77
One-three nights	15.5	65	66	67	72
Four-nine nights	12.7	72	74	73	79
Ten or more nights	13.8	71	73	74	77
Purchased travelers checks	14.3	72	74	74	78
$750 or more	4.7	74	77	76	80
$450 to $749	4.1	73	77	75	81
Less than $450	5.5	69	70	72	74
Used travel agent	11.8	72	74	74	78

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

TRAVEL: FOREIGN TRAVEL
(Total Adults)

	Percent of Total Population	Total U.S.		All Metros	
		Daily	Sunday	Daily	Sunday
Own currently valid passport	10.5%	73%	70%	71%	74%
One or more trips past 3 years:*	15.3	72	74	73	77
Any business trip for self	1.7	74	75	76	78
Any vacation trip	7.5	73	76	74	79
Any personal trip (not vacation)	4.0	70	72	72	75
Mode of transportation:					
Scheduled plane	9.9	73	75	74	78
Charter plane	2.3	72	74	74	79
Cruise ship	1.8	75	79	75	81
Number of trips by plane:					
One round trip	6.5	70	72	70	75
Two or more round trips	7.0	73	75	76	78
Destination:					
Canada	4.1	75	78	77	81
Mexico	2.8	66	70	67	72
Hawaii	2.6	74	76	74	78
United Kingdom	2.1	77	77	79	82
Used travel agent	9.3	74	76	75	79

*Includes travel to Alaska, Hawaii, Puerto Rico and U.S. Virgin Islands.

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

A8600 - 8.40 U (A)
12/87

COUPON FACTS, 1987

Cents-Off Coupon Usage and Users in the U.S. and Canada

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921-5080

COUPON FACTS, 1987

Cents-Off Coupon Usage and Users in the U.S. and Canada

This document is one of a series of marketing
research reports prepared by the Newspaper
Advertising Bureau, Inc., as a service to
the newspaper business and its advertisers.

October 1987

Newspaper Advertising Bureau

INTRODUCTION

Since C. W. Post created the first coupon for a penny off on Grape Nuts Flakes in 1895, coupons have become a staple of American marketing and purchasing. The purpose of this report is to present information about recent trends in the distribution and use of coupons.

The report builds on a number of sources of data that have become available since the previous version of Coupon Facts was issued in 1985. The sources provide information about couponing in both the United States and Canada and incorporate data from both surveys (of consumers and marketing executives) and coupon clearing houses. Clearing house data refer only to manufacturer coupons and provide no information about the "in-ad" coupons issued by a store or chain and redeemable by that retailer only. Consumer data, on the other hand, reflect experience with all coupons.

This is the most recent in a series of reports on coupon usage produced under the direction of Charles Lehman of NAB's Research Department. Carolyn Eldred was responsible for this update. For additional information call Carolyn Eldred at (212) 704-4615.

CONTENTS

Page

INTRODUCTION ii

LIST OF TABLES. v

I. THE PREVALENCE OF COUPONING 1

1. The Frequency of Coupon Use by American Households 1
2. The Growth of Manufacturer Coupons Distributed in the U.S. . 1
3. The Frequency of Coupon Use in Canadian Households 2
4. The Growth in Manufacturer Coupons Distributed in Canada . . 3

II. MEDIA CHOICES FOR COUPON DISTRIBUTION 4

1. Media Distribution Patterns and Trends in the U.S. 4
2. U.S. Redemption Rates for Print Media and Direct Mail . . . 6
3. U.S. Redemption Rates for In/On Package Coupons 7
4. Where Users Get Coupons 8
5. Distribution of Manufacturer Coupons in Canada 9
6. Redemption Rates for Canadian Coupons 9

III. THE FACE VALUE OF CENTS-OFF COUPONS 11

1. The Rise in the Average Face Value of Coupons in the U.S. . 11
2. Distribution of Face Values of Coupons in the U.S. 12
3. Minimum Face Values U.S. Consumers Would Use 13
4. Trends in the Face Value of Coupons in Canada 14
5. Distribution of Face Values in Canada 15
6. Minimum Face Value for Coupon Redemption by Canadians . . . 16

IV. COUPON USERS 17

1. U.S. Coupon Users 17
2. Canadian Coupon Users 19

V. RESPONSE AND TIMING PATTERNS FOR COUPONS 20

1. How Couponing Affects Product Sales Patterns 20
2. Timing from Appearance of Ad through Processing 22

VI. OTHER TOPICS IN COUPONING 23

1. Standardization of Coupon Size and Design 23
2. Expiration Dates 23
3. UPC Scanning 23
4. Trends in Coupon Use 24
5. Increasing the Effectiveness of Coupons 25

BIBLIOGRAPHY 26

APPENDIX A: SOURCES FOR BUYING NEWSPAPER COUPON ADVERTISING 27

APPENDIX B: ADDITIONAL SOURCES OF INFORMATION 29

LIST OF TABLES

Table Page

1. Number of Manufacturer Coupons Distributed, U.S., 1980-1986 . . . 2

2. Coupon Use by Canadian Shoppers, 1985 2

3. Annual Growth Rate of Manufacturer Coupons Distributed in the U.S. and Canada, 1980-1986 3

4. Media Distribution of Manufacturer Coupons, U.S., 1986 5

5. Manufacturer Coupon Distribution, 1981-1986, U.S. 5

6. Redemption Rates for Manufacturer Coupons: Grocery Items, 1986, U.S. 6

7. Redemption Rates for Manufacturer Coupons: Health and Beauty Aids, 1986, U.S. 7

8. Redemption Rates for Manufacturer Coupons: In/On Package Coupons, 1986, U.S. 8

9. Coupon Use by U.S. Households in 1986: Source and Frequency Of Use 8

10. Manufacturer Coupon Distribution in Canada, 1986 9

11. Manufacturer Coupon Redemption Rates for Canada, 1981-1985, Food and Household Care Products 10

12. Average Face Value of Manufacturer Coupons, U.S. 12

13. Distribution of Face Values of Manufacturer Coupons, U.S., 1986 . 13

14. Minimum Face Value U.S. Customers Require to Use Coupons 14

15. Distribution of Manufacturer Coupons by Face Value, Canada, 1981-1985 15

16. Minimum Value for Canadian Shoppers to Use Coupons, 1985 16

17. Rates of Coupon Use by Characteristics of Female Homemakers, U.S., 1986 18

18. Rate of Coupon Use Among Primary Grocery Shoppers, Canada, 1985 . 19

19. Index of Unit Sales Results of Newspaper ROP Coupon Ads, 1981-1984 20

I. THE PREVALENCE OF COUPONING

1. The Frequency of Coupon Use by American Households

The 1986 Study of Media and Markets by Simmons Market Research Bureau estimates that 65% of American households in which a female homemaker is present use cents-off coupons. More than half of U.S. households (56%) use coupons for food and grocery products, nearly a third (31%) for beauty and grooming products, and around a fourth each for drug products (26%) and fast food or franchise restaurant purchases (24%).

2. The Growth of Manufacturer Coupons Distributed in the U.S.

The number of manufacturer coupons distributed hit new records in 1986. According to Manufacturers Coupon Control Center (MC3) (1987a), over 202 billion coupons were distributed in the U.S. during the past year (Table 1), which amounts to 840 coupons for every man, woman, and child in the country. This is more than double the number of coupons distributed in 1980 and 111% more per capita.

In 1986 the number of manufacturer coupons distributed grew 13%, and the growth rate over the the last five years has been 69%. Grocery coupons account for about 79% of coupons distributed, and health and beauty aids for 21%, up from 19% the previous year. At 26%, 1986 growth in the number of coupons for health and beauty aids substantially exceeded that for grocery coupons, which experienced 9% growth (Manufacturers Coupon Control Center, 1987a,b).

Table 1

NUMBER OF MANUFACTURER COUPONS DISTRIBUTED:
U.S., 1980-1986

Year	Total	Per Person	Grocery	H&BA
1986	202.6 billion	840	159.4 billion	43.2 billion
1985	179.8 billion	753	145.5 billion	34.3 billion
1984	163.2 billion	691	133.5 billion	29.7 billion
1983	142.9 billion	611	118.3 billion	24.6 billion
1982	119.5 billion	516	95.5 billion	24.0 billion
1981	102.4 billion	447	79.6 billion	22.8 billion
1980	90.6 billion	399	72.8 billion	17.8 billion

Source: Manufacturers Coupon Control Center, 1987a
Nielsen Clearing House, earlier years

3. The Frequency of Coupon Use in Canadian Households

When Canadian shoppers were surveyed in Canada by Nielsen in 1985, 83% reported coupon usage during the previous year, 62% during the previous month, and 34% during the previous week.

Table 2

COUPON USE BY CANADIAN SHOPPERS, 1985

Recency of Use	Percent of Shoppers
Past week	34%
Past 2-4 weeks	28
Past 2-3 months	11
Past 4-12 months	10
Over a year ago	7
Never use	10

Source: Nielsen Promotion Services, 1986

4. The Growth in Manufacturer Coupons Distributed in Canada

The number of coupons distributed in Canada stood at 4 billion in 1985, an increase of 60% since 1981. This figure amounts to 158 coupons per person, just 19% of the U.S. ratio. In Canada, growth in coupon distribution peaked in 1980 and 1981, while in the U.S. it peaked during 1982 and 1983. In recent years, coupon distribution has grown at comparable rates in the two countries.

Table 3

ANNUAL GROWTH RATE OF MANUFACTURER COUPONS
DISTRIBUTED IN THE U.S. AND CANADA, 1980-1986

Year	Canada	U.S.
1986	n.a.	13%
1985	11%	10
1984	13	14
1983	12	20
1982	12	17
1981	25	13
1980	23	12

Source: Manufacturers Coupon Control Center, 1987a
Nielsen Clearing House, earlier years
Nielsen Promotion Services, 1985

II. MEDIA CHOICES FOR COUPON DISTRIBUTION

1. Media Distribution Patterns and Trends in the U.S.

Newspapers continue to be the medium of choice for manfacturer cents-off coupon distribution, even more so than in previous years (Tables 4, 5). In 1986 a record 84% of these coupons were distributed by newspapers (Manufacturers Coupon Control Center, 1987a,b).

Over two-thirds of all manufacturer coupons were distributed in newspaper inserts. In the health and beauty aid field, 75% of all manufacturer coupons went into newspaper inserts.

The free-standing insert as a component of newspapers has attracted a steadily growing share of all coupons. Its share has more than doubled since 1981.

Table 4

MEDIA DISTRIBUTION OF MANUFACTURER COUPONS, U.S., 1986

Method	Total	Grocery	H&BA
Newspapers	83.7%	84.7%	80.5%
Daily ROP solo	7.4	8.8	2.2
Co-op	7.1	8.6	1.9
Sunday supplement	1.2	1.1	1.4
Free-standing inserts	68.0	66.2	75.0
Magazines	6.5	5.3	10.8
Direct mail	4.0	3.7	5.1
In/on pack	5.8	6.3	3.6

Source: Manufacturers Coupon Control Center, 1987a,b

Table 5

MANUFACTURER COUPON DISTRIBUTION, 1981-1986, U.S.

Method	1981	1982	1983	1984	1985	1986
Newspapers	78.5%	77.9%	80.1%	82.1%	82.2%	83.7%
Daily ROP	27.3	23.1	20.0	17.3	12.2	7.4
Co-op	17.7	15.2	12.2	10.0	8.0	7.1
Sunday supplements	7.3	6.3	4.9	3.3	2.1	1.2
Free-standing inserts	26.2	33.3	43.0	51.5	59.9	68.0
Magazines	11.8	11.4	10.0	8.5	8.6	6.5
Direct mail	3.3	3.8	4.3	4.4	4.4	4.0
In/on pack	6.4	6.9	5.6	5.0	4.8	5.8

Source: Manufacturers Coupon Control Center, 1987a
Nielsen Clearing House, earlier years

2. U.S. Redemption Rates for Print Media and Direct Mail

Many factors influence redemption rates, most notably the medium used for distribution. Redemption rates can also be affected by the face value of the coupon, degree of brand loyalty, target audience for the product, visual appeal and persuasiveness of the ad, retail availability of the product, competitive activity, and kind of product being couponed. For instance, grocery coupons generally are redeemed at a higher rate than coupons for health and beauty aids, which usually cost more and have lower consumption levels.

Because so many factors affect redemption rates, MC3 provides "middle-half ranges" for each medium, that is, the redemption rates for coupon offers at the 25th and 75th percentiles of redemption frequency.

Table 6

REDEMPTION RATES FOR MANUFACTURER COUPONS:
GROCERY ITEMS, 1986, U.S.

Medium	MC3 Average	Mid-Half Redemption Rate
Newspaper:		
ROP solo	2.2%	0.8% - 3.4%
Co-op	2.3	1.0 - 3.6
Sunday supplement	1.5	0.7 - 2.2
Sunday insert	4.0	2.3 - 5.9
Magazines:		
On page	1.7	0.8 - 2.5
Pop up	4.0	2.2 - 6.0
Direct mail	6.4	3.7 - 10.5

Source: Manufacturers Coupon Control Center, 1987a

Table 7

REDEMPTION RATES FOR MANUFACTURER COUPONS:
HEALTH AND BEAUTY AIDS, 1986, U.S.

Medium	MC3 Average	Mid-Half Redemption Rate
Newspapers:		
ROP solo	1.0%	0.3% - 1.9%
Co-op	0.9	0.3 - 1.8
Sunday supplement	0.5	0.2 - 0.9
Sunday insert	2.3	1.4 - 3.5
Magazines:		
On page	0.8	0.3 - 1.3
Pop up	1.9	1.3 - 2.9
Direct mail	6.0	2.5 - 9.4

Source: Manufacturers Coupon Control Center, 1987b

3. U.S. Redemption Rates for In/On Package Coupons

Coupons are distributed not only through the mass media, but also on package containers or inside the package. As might be expected, "regular" coupons redeemable for the same product contained in the package enjoy higher redemption rates than do coupons for different ("cross") products, which nonetheless have rather high rates. Still another variant is the "instant on-pack" coupon, which is redeemable for the product it appears on at the time of purchase. While enjoying the highest redemption rates of any medium (30% for groceries, 33% for health and beauty aids), the fact that more than two-thirds of these coupons are not redeemed is puzzling.

Table 8

REDEMPTION RATES FOR MANUFACTURER COUPONS: IN/ON PACKAGE COUPONS, 1986, U.S.

	Groceries		Health and Beauty Aids	
Coupon Type	MC3 Average	Mid-Half Redemption Rate	MC3 Average	Mid-Half Redemption Rate
Regular in-pack	14.3%	5.9% - 23.3%	8.2%	3.9% - 13.2%
Regular on-pack	11.9	5.6 - 22.1	12.3	5.9 - 19.9
Cross in-pack	5.5	2.5 - 8.2	2.5	1.4 - 4.0
Cross on-pack	5.0	2.3 - 7.9	2.7	1.5 - 4.1
Instant on-pack	29.5	14.8 - 50.2	32.9	16.4 - 51.9

Source: Manufacturers Coupon Control Center, 1987a,b

4. Where Users Get Coupons

According to female homemakers in the Simmons study, 59% of households obtain cents-off coupons from newspapers, while 52% obtain them through the mail, 37% from magazines, and 37% from packages. In the course of a week, 29% of the households use newspaper coupons, 20% use coupons obtained by mail, 15% use coupons found in magazines, and 15% redeem in/on pack coupons.

Table 9

COUPON USE BY U.S. HOUSEHOLDS IN 1986 SOURCE AND FREQUENCY OF USE

	Source			
Frequency	Newspapers	Mail	Magazines	In/on pack
Once a week or more	29%	20%	15%	15%
2 - 3 times a month	15	14	10	9
Once a month or less	15	18	13	13
Ever use	59	52	37	37

Source: Simmons Market Research Bureau
1986 Study of Media & Markets

5. Distribution of Manufacturer Coupons in Canada

Free-standing newspaper inserts (FSIs) are the predominant mode of coupon distribution in Canada, accounting for 43% of coupons distributed; other newspaper advertising accounts for another 14% (Nielsen Promotion Services, in Canadian Daily Newspaper Publishers Association, 1987). The use of FSIs has increased substantially since 1983, when it stood at 25%. Direct mail accounts for 18% of the coupons distributed, in/on pack coupons for 11%, and magazines for only 5%.

Table 10

MANUFACTURER COUPON DISTRIBUTION IN CANADA, 1986

Method	Percent
Newspapers	57%
ROP	14
Inserts	43
Magazines	5
Direct mail	18
In/on pack	11
Other	9

Source: Nielsen Promotion Services, 1987

6. Redemption Rates for Canadian Coupons

Nielsen Promotion Services (1985) analyzed coupon redemption patterns in Canada between 1981 and 1985 and found the highest rates for regular in/on pack coupons and direct mail, particularly selective direct mail. Of the print media, coupons in FSIs enjoy higher redemption rates than those in magazines, newspaper ROP advertising, and retailers' ads.

Table 11

MANUFACTURER COUPON REDEMPTION RATES FOR CANADA, 1981-1985, FOOD AND HOUSEHOLD CARE PRODUCTS

Method of Distribution	Median Rate	Range of Rates (Excluding Highest & Lowest 10%)
Newspapers:		
ROP	1.7%	0.3% - 4.2%
Free-standing inserts	4.8	2.4 - 9.9
Retailer in-ad	0.6	0.1 - 4.2
Magazines	2.7	0.5 - 9.1
Direct mail:		
Cooperative	9.8	1.8 - 21.9
Rideau Kiwanis	5.9	3.2 - 8.9
Selective direct mail	20.3	9.1 - 34.3
In/on pack:		
Regular in-pack	23.1	4.5 - 52.2
Regular on-pack	14.4	0.7 - 33.6
Cross in-pack	10.8	2.7 - 23.2
Cross on-pack	3.2	0.8 - 11.9

Source: Nielsen Promotion Services, 1985

III. THE FACE VALUE OF CENTS-OFF COUPONS

1. The Rise in the Average Face Value of Coupons in the U.S.

Early in the 1980s growth in the face value of coupons was relatively flat when adjusted for inflation. Since 1983 and 1984, however, increases in the face value of coupons have outstripped inflation, and coupons are now worth substantially more in constant dollars than at the start of the decade (Table 12).

While grocery prices in general have increased 13% since 1981 (Bureau of Labor Statistics), the face value of grocery coupons has increased by 51% to an average of 29.8 cents. The face value for health and beauty aid coupons has increased 86% since 1981, while the price index for all items has increased only 17%. Coupons for health and beauty aids now have an average face value of 45.1 cents.

Table 12

AVERAGE FACE VALUE OF MANUFACTURER COUPONS, U.S.

	Groceries		Health & Beauty Aids	
Year	Face Value	In '81 Cents	Face Value	In '81 Cents
1981	19.8 cents	19.8 cents	24.2 cents	24.2 cents
1982	21.7	21.1	26.1	24.6
1983	24.1	23.0	29.0	26.4
1984	26.2	24.3	34.3	30.1
1985	27.3	24.8	38.3	32.5
1986	29.8	26.4	45.1	37.3

Source: Manufacturers Coupon Control Center, 1987a
Nielsen Clearing House, earlier years
Bureau of Labor Statistics

2. Distribution of Face Values of Coupons in the U.S.

According to MC3, the average (mean) face value of grocery coupons in the U.S. stood at 29.8 cents in 1986, an increase of 2.5 cents (9%) from 1985. In recent years face values below 25 cents have gradually given way to values of 25 cents or more. In 1986 the most frequently distributed grocery coupons were those with a face value of exactly 25 cents (28%), while 36% had a value of more than 25 cents (Table 13).

Face values of coupons for health and beauty aids are generally higher than those for grocery coupons. Health and beauty aid coupons have an average face value of 45.1 cents, reflecting the fact that over the years values below 40 cents have given way to higher face values. In 1986 the most common health and beauty aid coupon had a face value of 50 cents (28%), while an additional 17% had even higher face values. Nonetheless, the 25-cent health and beauty aid coupon remains popular.

Table 13

DISTRIBUTION OF FACE VALUES OF MANUFACTURER COUPONS, U.S., 1986

Face Value	Groceries	Health & Beauty Aids
10-15 cents	17.0%	2.3%
20 cents	19.5	4.9
25 cents	27.8	24.1
30-40 cents	21.0	24.8
50 cents	9.6	28.2
55-75 cents	2.6	4.8
$1.00 +	2.5	10.9

Source: Manufacturers Coupon Control Center, 1987a,b

3. Minimum Face Values U.S. Consumers Would Use

In its most recent survey of American consumers, conducted in 1984, Nielsen inquired about the minimum face value a coupon would need to have for shoppers to use it. The answer depended on whether they had previously used the product. At the time of the survey, a substantial minority (43%) of those who had used the product before said that they would redeem a coupon worth less than 15 cents. By contrast, the vast majority (78%) of those who had not previously used the product required a coupon of at least 25 cents in order to redeem it.

Table 14

MINIMUM FACE VALUE U.S. CUSTOMERS REQUIRE TO USE COUPONS

	Percent Who Would Use If:	
Face Value	Product Used Before	Product Not Used Before
Under 15 cents	43%	9%
15 - 24 cents	33	13
25 cents	16	27
Over 25 cents	8	51

Source: Nielsen Clearing House, 1985c

4. Trends in the Face Value of Coupons in Canada

In its 1985 report analyzing coupon redemption in Canada, Nielsen Promotion Services reported a 15% increase in the median face value of coupons since its 1982 report, from 20 cents to 23 cents. Nielsen observed, however, that prices increased more rapidly during that same period. Other trends noted by Nielsen include a decrease in the proportion of coupons offering less than 15 cents off (from 18% to 6%) and an increase in high value multiple purchase offers.

5. Distribution of Face Values in Canada

During the 1981-1985 period, the most common face values for coupon offerings in Canada were 15, 20, and 25 cents. Together, these denominations accounted for just over half of all coupons issued (excluding retailer in-ad coupons).

Table 15

DISTRIBUTION OF MANUFACTURER COUPONS BY FACE VALUE, CANADA, 1981-1985

Face Value	Percent Distributed*
Less than 15 cents	6%
15 cents	20
18 cents	5
20 cents	13
23 cents	7
25 cents	19
30 cents	5
35 cents	4
40 cents	5
50 cents	7
51 cents or more	5
Other	4

*Excluding retailer in-ad coupons

Source: Nielsen Promotion Services, 1985

6. Minimum Face Value for Coupon Redemption by Canadians

According to Nielsen Promotion Services, the predominant face value Canadian coupon users say they would require to redeem a coupon is 25 cents, cited by 27%. Below a face value of 25 cents, each five cent increase above 15 cents raises the number who would use the coupon by at least 10% of the cumulative total, with the largest increase occurring between 20 and 25 cents.

Table 16

MINIMUM VALUE FOR CANADIAN SHOPPERS TO USE COUPONS, 1985

Minimum Face Value	Percent Who Require to Use
10 cents	18%
15 cents	11
20 cents	13
25 cents	27
30 cents	7
40 cents	5
50 cents	8
75 cents	3
Free/depends on product	8

Source: Nielsen Promotion Services, 1986

IV. COUPON USERS

1. U.S. Coupon Users

According to information obtained from female homemakers by Simmons Market Research Bureau in its 1986 Study of Media & Markets, 65% of their households use manufacturer and/or store coupons, and the majority of women in almost every demographic category surveyed belong to coupon-using households (Table 17).

Coupon use is most common in larger households that have an annual income of at least $20,000, that are located in a suburb in the northeast or midwest, and where the female homemaker is between the ages of 25 and 64, married, white, and a high school graduate. Coupon use is less frequent in the households of minority women, those at lower income levels, and those who have not completed high school.

Table 17

RATES OF COUPON USE BY CHARACTERISTICS OF FEMALE HOMEMAKERS, U.S., 1986

Age	Percent
18 - 24	59%
25 - 34	65
35 - 44	67
45 - 54	70
55 - 64	69
65 +	63
Marital Status	
Married	70
Single	55
Other	60
Race	
White	68
Black	48
Other	41
Education	
College graduate	68
Some college	72
High school graduate	67
Not HS graduate	57
Employment Status	
Work full time	63
Work part time	70
Not employed	66
Occupation	
Profess/managerial	67
Tech/cler/sales	68
Other	58

Household Income	Percent
$30,000 & over	70%
$20,000 - $29,999	70
$10,000 - $19,999	63
Less than $10,000	55
Size of Household	
One person	61
Two persons	65
Three-four persons	67
Five or more persons	68
Geographical Region	
Northeast	73
Midwest	75
South	57
West	60
County Size	
A	64
B	69
C	65
D	63
Locality Type	
Central city	60
Suburb	70
Non-metro	64
OVERALL	65

Source: Simmons Market Research Bureau
1986 Survey of Media & Markets

2. Canadian Coupon Users

According to Nielsen Promotion Services, the primary grocery shopper in 83% of Canadian households used coupons in the last year, with 62% having used coupons within the last month. Users are somewhat more likely to be women than men and are similar demographically to their U.S. counterparts. Use of coupons is highest among the married, those with larger households, those between 30 and 60, the more affluent, and those with larger food budgets. However, a majority of shoppers in almost every demographic group have used coupons in the last month, and a substantial majority in all groups have used them in the last year.

Table 18

RATE OF COUPON USE AMONG PRIMARY GROCERY SHOPPERS, CANADA, 1985

	Percent Last:	
Gender	Year	Month
Female	85%	65%
Male	76	57
Age		
18 - 30	82	60
31 - 45	83	63
46 - 60	84	65
61 +	81	58
Marital Status		
Married	85	65
Single	80	52
Other	77	51
OVERALL	83	62

	Percent Last:	
Household Size	Year	Month
1 - 2 persons	81%	58%
3 - 4 persons	82	64
5+ persons	89	64
Household Income		
Over $40,000	84	67
$25,001 - $40,000	83	63
$15,001 - $25,000	83	60
$15,000 & under	81	56
Grocery Costs/Week		
$101 or more	85	63
$71 - $100	84	68
$56 - $70	83	67
$41 - $55	79	60
$40 or less	77	48

Source: Nielsen Promotion Services, 1986

V. RESPONSE AND TIMING PATTERNS FOR COUPONS

1. How Couponing Affects Product Sales Patterns

Based on data provided by NABSCAN, a company that formerly measured product sales on a daily basis through computerized scanning, the Newspaper Advertising Bureau analyzed 50 ROP ads appearing in daily newspapers between 1981 and 1984. The typical coupon ad resulted in a median sales increase of 40% during the week the coupon appeared over the level of the previous week. Further, in three-quarters of the cases, sales continued at an above average level the following week. Sales in the second week averaged 23% above those of the base week and in some cases even exceeded those of the first week.

Table 19

INDEX OF UNIT SALES RESULTS OF
NEWSPAPER ROP COUPON ADS, 1981-1984
(Based on 100 for Week Before Ad)

Product	Coupon Amount	Week Of Ad	Week After Ad
Ajax & Baggies	15 cents each	148	87
Aunt Jemima	10 cents	178	195
Ben Gay	30 cents	143	151
Betty Crocker Mix	10 cents	130	160
Betty Crocker Potatoes	20 cents	113	91
Campbells Pork & Beans	12/15 cents	147	61
Cheerios & Wheaties	50 cents both	135	136
Cheese Ritz Crackers	15 cents	127	98
Chex Cereals	50 cents	286	365
Chex Cereals	50 cents	123	102
Coca Cola	20/50 cents	147	116
Coca Cola Products	50 cents	132	217
Delicaseas Seafood	25 cents	208	257
Diet Rite Cola	30 cents	124	98
Doxsee Clams/Chowder	30 cents for 2	367	392

Table 19 (Continued)

Product	Coupon Amount	Week Of Ad	Week After Ad
Gorton's Seafood	20 cents	126	88
Heinz Sauce	40 cents for 2	422	199
Kelloggs Crispix	50 cents	3411	3378
Kraft Parmesan	20 cents	118	98
Lipton Soup	15 cents	196	129
Lipton Soup	15 cents	147	157
Minute Maid	15 cents	302	281
Miss Breck Spray	20/50 cents	134	111
Morrell Wieners	25 cents	186	94
Mrs. Pauls Fillets	30 cents	164	114
Nabisco Champs	25 cents	266	390
Nabisco Chips Ahoy	25 cents	132	135
Nestea	28 cents	132	105
New Breed Dog Food	$1.00	128	95
Oscar Mayer Chees Dogs	15 cents	136	173
Pennsylvania Dutch Egg Noodles	10 cents	161	169
Pepsi	20 cents	239	111
Philadelphia Cheese	20 cents	156	141
Purex Detergent	25 cents	128	191
Purina Dinners	25 cents	119	115
Ralston Purina Breakfast Items	35 cents	116	123
Reynolds Wrap	25 cents	151	112
Sanka Coffee	60 cents	121	114
Sego Diet Drink	15 cents	123	122
Snowy Bleach	20/40 cents	143	128
Solo Detergent	50 cents	126	124
Sweet 'N' Low	20/40 cents	123	129
Sweet 'N' Low	20 cents	130	100
Tang	40 cents	113	119
Uncle Ben's Rice	15 cents	179	93
Van de Kamp's Seafood	20 cents	169	176
Vera Toilet Tissues	25 cents	127	95
Weaver Rondelets	25 cents	193	170
Woolite	10/25 cents	123	110
Yes Detergent	30 cents	157	129

Source: NABSCAN
Newspaper Advertising Bureau

2. Timing from Appearance of Ad through Processing

The redemption process begins when the consumer uses coupons at the store. The store then submits the coupons to its chain or division headquarters, to its clearing house, or to various manufacturers' clearing houses. Large stores may submit their coupons weekly, while small stores may forward their coupons as infrequently as every six months. The number of levels between the retailer and the manufacturer or its clearinghouse is another determinant of the amount of time required for processing. Thus, even when customers redeem coupons promptly, there is a considerable time lag between coupon distribution and return of the redeemed coupons to the manufacturer.

Customers do not always redeem coupons promptly, however. As reported previously by the Newspaper Advertising Bureau, 66% of principal grocery shoppers keep a file of coupons for future use. The medium selected for coupon distribution also affects speed of redemption. The median time for redemption and clearing of grocery coupons carried by newspapers is about four months, by magazines, six months, and through in/on pack coupons, seven months. Coupons for health and beauty aids have longer redemption times because of lower product turnover.

Nielsen Promotion's (1985) analysis of grocery coupon redemption between 1981 and 1985 reveals similar patterns in Canada. Median redemption and clearance times are around four months for coupons from newspapers, six months for coupons from magazines, eight months for in/on-pack coupons, and six months for direct mail coupons.

VI. OTHER TOPICS IN COUPONING

1. Standardization of Coupon Size and Design

Coupons have appeared in a variety of shapes and sizes, but standardization of coupons can prove advantageous. Coupons of a predictable size and design should be more recognizable to consumers and are easier to handle as well. By contrast, nonstandard coupons, self-destruct coupons, peel-off coupons with sticky backs, and complicated purchase requirements --including size and multiple-purchase specifications--are more difficult to handle.

2. Expiration Dates

Manufacturers prefer that coupons bear an expiration date in order to limit the time frame for their liability and to permit short-term measures of the effectiveness of their coupon promotions. Retailers, on the other hand, prefer coupons without expiration dates, since they must absorb the cost of any expired coupons they redeem. A recent review of 400 coupons issued in late 1986 and early 1987 showed that expiration dates are still the norm. Just 22% of the coupons examined had no expiration date, while 18% expired in thirty days or less, 40% in three to six months, 20% in six to twelve months, and 1% in more than a year (Summary Scan, 1987).

3. UPC Scanning

The substantial increase in the placement of UPC symbols on coupons is one of the most dramatic recent developments in couponing. According to Donnelly Marketing's 9th Annual Survey of Promotion Practices, 46% of companies surveyed in 1986 have completed the task of placing UPC symbols on their coupons, up from only 7% in 1984. An additional 24% are definitely committed to doing so, and another 24% anticipate doing so but have not made a firm decision. More than twice as many large firms ($1 billion or more in revenues) as small firms have completed the task, 65% and 31%, respectively. However, 28% of these smaller firms are definitely committed to placing UPC symbols on their coupons, and another 33% expect to do so but have not made a firm decision (33%).

The UPC symbol can be helpful not only in the clearing process but also when the coupon is redeemed. If scanners are used at the checkout counter, the face value of store-issued coupons is automatically deducted from the total bill and verification of proper product purchase is simplified.

4. Trends in Coupon Use

The sources drawn on in this report, as well as articles in the trade press (e.g., Bowman, 1986 and Kingsbury, 1987) are consistent in their portrayal of recent trends in couponing. The total number of coupons distributed each year has continued to grow, although the rate of growth has declined since the early part of the decade. While the number of coupons redeemed has also continued to grow accordingly, redemption rates have been falling (except for instant on-pack coupons).

Although the majority of households use coupons, heavy coupon use is more concentrated. One source (Kingsbury, 1987) indicates that 20% of total households account for more than half of all redemptions, and another (NPD/Marketrax, 1987) notes that 31% account for as much as 72% of redemptions. Kingsbury suggests that the ability of already heavy coupon users to make use of more coupons is limited by their need for the promoted products.

5. Increasing the Effectiveness of Coupons

Creativity and quality are as important in coupon ads as they are in other forms of advertising. Landsman (1984) recommends that coupon ads contain strong graphics, have inviting headlines, keep their message simple, and not appear embarrassed to contain coupons. Since ad coupons redeeming at the 75th percentile generally do three to four times better than those redeeming at the 25th percentile in the same medium, the quality of the ad may very well be a factor.

Finally, the effectiveness of coupons is not measured by redemptions alone. A coupon campaign should encourage product trials and brand switching. In Nielsen's survey of primary grocery shoppers in Canada, 54% of coupon users indicated that during the previous year they had used a coupon to purchase a product they had never used before, and 73% would switch brands in some product categories if offered coupons. In addition to its effects on consumer behavior, a well-orchestrated promotion should encourage new stores to begin carrying the product. Thus, a first-rate coupon compaign should have the effect of leveraging significant sales well beyond those directly associated with coupon redemption.

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APPENDIX A

SOURCES FOR BUYING NEWSPAPER COUPON ADVERTISING

1. Newspaper Representatives

A complete list of newspapers and their "reps" can be found in:

- Editor and Publisher Yearbook
  11 West 19th Street
  New York, NY 10011
  (212) 675-4380

- Standard Rate and Data Service-Newspapers
  3004 Glenview Road
  Wilmette, IL 60091
  (312) 256-6067
  (800) 323-4601

  - Eastern Sales Office
    866 Third Avenue
    New York, NY 10022
    (212) 702-6885

  - Western Sales Office
    11500 Wilshire Blvd., Suite 355
    Los Angeles, CA 90064
    (213) 478-0354

2. Sunday Magazines

- Parade Magazine
  750 Third Avenue
  New York, NY 10017
  (212) 573-7000

- Sunday Magazine Network
  260 Madison Avenue
  New York, NY 10016
  (212) 689-8200

- USA Weekend
  535 Madison Avenue
  New York, NY 10022
  (212) 715-5300

3. ROP and FSI Coupon Promotion Firms

- The Sunflower Group
  10895 Lowell
  Overland Park, KS 06210
  (913) 451-2125

  ROP advertising.

- Mr. Patrick Hayden
  Valassis/NCC Black & White
  Farmington Westhills Office Park
  34115 West Twelve Mile Road
  Farmington Hills, MI 48018
  (313) 553-9400
  (800) 437-0479

  FSIs at least biweekly, plus ROP. National coverage.

- Ms. Charlotte Saponaro
  Media Director
  Quad Marketing
  1290 Avenue of the Americas
  New York, NY 10104
  (212) 603-6000

  FSIs at least biweekly. National coverage.

- Mr. Kent Hobby
  Vice President, Sales and Marketing
  Product Movers, Subsidiary of Charles Offset Co.
  621 Avenue of the Americas
  New York, NY 10011
  (212) 255-3800

  FSIs at least biweekly. National coverage.

- Ms. Kay Franklin
  National Sales Manager
  BDS Marketing
  500 Turnpike Street
  Canton, MA 02021
  (617) 821-0900

  FSIs semi-annually. New England coverage.

- Ms. Jacqueline Molligo
  General Manager
  Great Events Promotions, Inc.
  125 Mineola Avenue
  Roslyn Heights, NY 11577
  (516) 484-0411

  FSI annually. Coverage of the Metro New York area, including some parts of New Jersey and Connecticut.

APPENDIX B

ADDITIONAL SOURCES OF INFORMATION

- Manufacturers Coupon Control Center
  1900 North 3rd Street
  Clinton, IA 52732
  (319) 242-4505

  - Cherry Hill, NJ (609) 662-1235
  - Hackensack, NJ (201) 487-5310
  - Menlo Park, CA (415) 321-7700
  - Los Angeles, CA (213) 263-9991
  - New York, NY (212) 868-8830
  - Northbrook, IL (312) 498-6300

- Nielsen Promotion Services
  A.C. Nielsen Company of Canada, Limited
  160 McNabb Street
  Markham ON L3R 4B8 Canada
  (416) 475-3344

- Donnelley Marketing
  70 Seaview Avenue
  P.O. Box 10250
  Stamford, CT 06904
  (203) 353-7000

- Summary Scan
  Advertising Checking Bureau
  2 Riverside Plaza
  Suite 2400
  Chicago, IL 60606
  (312) 454-1907

- Newspaper Advertising Bureau
  1180 Avenue of the Americas
  New York, NY 10036
  (212) 921-5080

A8600 - 8,41 F 12/87

THE PERSONAL TRAVEL MARKET IN THE UNITED STATES

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921-5080

The Personal

Travel Market

In the United States

This is one of a series of marketing research reports provided as a service to the newspaper business and its advertisers. This study was prepared by the Barrow Information Group (P.O. Box 8118, Silver Spring, MD) for the Newspaper Advertising Bureau, Inc.

October 1987

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CONTENTS

Page

LIST OF TABLES..........................iii

INTRODUCTION.......................... 1

How the Study Was Done.................. 3

Highlights.......................... 7

DETAILED FINDINGS...................... 14

Overview.......................... 14

Length of Stay in Nights........... 16

When Planning Started for Trip...... 18

With Whom Primary Pleasure Travellers (PPTs) Travelled....... 20

Kind of Trips Will Take in Next 2 Years.......................... 22

Sources of Information............. 24

Satisfaction with Information Received.......................... 30

Where PPTs Live.................... 33

Age Distribution................... 36

Sex of Respondents................. 39

Marital Status of PPTs............. 42

Education of PPTs.................. 44

Income (Total Household) of PPTs.... 46

Spanish or Hispanic Origin of PPTs.. 48

Accommodations Used by PPTs......... 50

Other Services Used by PPTs......... 53

LIST OF TABLES

Page

1 . Percent of PPTs taking a particular type of vacation trip in the past year................ 15

2 . Length of stay in nights........................ 17

3 . When planning for trips PPTs started............ 19

4 . With whom PPTs travelled........................ 21

5 . Kind of trip PPTs definitely would take in next two years................................ 23

6 . Sources of information for a randomly selected trip taken in last 12 months......... 27

7 . Duplicate use of selected media as sources of information in planning a trip............. 28

7a. Mass media sources of information used by those PPTs who took a short vs those who took a long time to plan the trip and by those who played a major role in deciding where to go....................... 29

8 . Percent satisfied with information from: Travel Agent................................. 31

9 . Percent satisfied with information from: Tourist Offices.............................. 31

10 . Percent satisfied with information from: Airlines or other carriers.................... 32

11 . Region of the country........................ 34
12 . Region of the country for each trip type....... 35
13 . Age of PPTs and all respondents............... 37
14 . Age of primary pleasure travellers............ 38
15 . Sex of all respondents and all PPTs........... 40
16 . Sex of primary pleasure travellers............ 41
17 . Marital status of the PPTs.................... 43
18 . Education of primary pleasure travellers....... 45
19 . Household income (in thousands) of primary Pleasure Travellers......................... 47
20 . Hispanic origin of PPT Market................. 49
21 . Accommodations used by PPT Market.............. 52
22 . Other services used by the PPT Market.......... 54
23 . Airlines used by 5% of PPT flyers............. 55

INTRODUCTION

In the Fall of 1985 the Department of Regional Industrial Expansion, Tourism Canada, conducted a lengthy study of the U.S. pleasure travel market among a national probability sample of almost 9,000 U.S. residents, 16 years or older.

It did so, according to its report, because "Tourism is one of Canada's largest industries, generating $20 billion annually in the Canadian economy and employing some 600,000 people directly" and because the U.S. is Canada's "largest market and best potential source of increased tourism revenue."

Tourism Canada has graciously permitted the Newspaper Advertising Bureau to have access to the original data for its own analysis. This report is the result of that analysis.

The study, which defined pleasure travel as "any trip that was not made solely for business or personal reasons such as weddings, doctor's appointments and the like" which required travel of more than 100 miles from home and at least an overnight stay, contains information on:

The number of such trips (classified into eight categories) in the past year, the destination and length of the trips.

Media and non-media sources of information used in planning a randomly chosen trip from among seven of the eight trip-types and services used (such as airlines, car rentals, hotels/motels, etc) during the trip.

Future plans.

And, of course, key demographic information (such as age, sex, marital status, household income, education, geographic area and Hispanic origin).

The study also contains information not analyzed for this report on attitudes towards and expectations of selected destinations and on the kind of activities pleasure travellers feel are important in their choice of a particular kind of trip.

The original research and the data tabulation for this report was done by The Longwoods Research Group Limited of Toronto, Ontario. The data were analyzed by Lionel C. Barrow, Jr., of Washington, D.C., under the direction of B. Stuart Tolley, vice president, director of research, Newspaper Advertising Bureau.

Analyses of the characteristics of certain key subgroups (flyers; car renters; persons who purchased a packaged vacation trip, let a travel agent book the trip, stayed at a hotel, motel or resort lodge) are included in separate appendices.

HOW THE STUDY WAS DONE

A multi-stage, probability procedure was used to obtain information from 8,873 respondents.

First, the nation was stratified into nine Census divisions (New England/ Middle Atlantic/ East North Central/ West North Central/ South Atlantic/ East South Central/ West South Central/ Mountain/ Pacific) and approximately 1,000 interviews were conducted in each region.

Secondly, following a set of screening questions to ascertain the age, sex and travel status of each person in the household, an interview was conducted with a person, 16-years-old or older, chosen at random. Age and sex quotas were used to assure appropriate representation. Up to three callbacks and other special efforts were made to reduce the non-response rate and to achieve an interview with a designated respondent. No substitution was permitted.

Finally, after ascertaining certain generic pleasure trip information (that is, number of trips, length and destination of the longest trip in a particular trip category) from the designated respondent, other travel information (sources of information used in planning the trip, services used and attitude data) were obtained only for a single, randomly chosen pleasure trip -- if the respondent had taken more than one during the past 12 months.

The screening interview averaged five minutes and the rest of the questionnaire with a qualified respondent averaged 50 minutes.

Data were weighted to reflect the age and sex distribution in a particular Census division and the division results were also weighted to reflect their appropriate proportion in the nation as a whole.

In this analysis, the terms "Primary Pleasure Traveller" or "Primary Pleasure Travel" market (PPT, for short) refer to those persons, 16 or older, who took a trip in the last 12 months that required travel of more than 100 miles and a stay of at least one night away from home AND whose trip was not solely for business or personal reasons such as weddings, doctor's appointments and the like or whose trips were not solely to visit a relative or a friend.

To summarize, the Primary Pleasure Travel (PPT) Market consists of those who:

-- are 16+;

-- took an overnight trip 100 miles from home in the past 12 months;

-- whose trip was not solely for business or personal reasons or to visit friends or relatives.

The study contains specific information on eight kinds of trips. The trip types were defined in the Tourism Canada study as follows:

1) A visit to friends and relatives is a trip whose primary purpose is to visit and spend time with friends or relatives.

2) A close-to-home leisure trip is a trip to a place close to home where you can enjoy facilities related to a beach, lake, seashore or park.

3) A touring trip is one by car, bus or train through areas of scenic beauty, cultural or general interest.

4) A city trip is a journey to a city where you may shop, visit museums, enjoy entertainment, dine, attend plays or concerts, or just stroll around and enjoy the city

5) An outdoors trip occurs in a natural area where you may engage in activities such as camping, hunting, fishing, hiking or rafting.

6) A resort trip is a journey to a resort or resort area where a wide variety of activities such as beaches, skiing, golfing, tennis and so on, are available nearby or on the premises.

7) A cruise is a trip on a cruise ship where you

enjoy all of the on-board activities and planned stops at points of interest along the way

8) A trip to a theme park, exhibition or special event is taken primarily for the purpose of visiting a major theme park or exhibition or special event such as a Super bowl, World's Fair or Olympic Games.

If a respondent indicated that a trip could fall into more than one trip type, the respondent was told to make the trip selection "based on the primary purpose of the trip. Thus, a particular trip was classified into one and only one category. Interviewers were also instructed to "be sure that a trip classified as a trip to visit friends and relatives is a trip whose prime purpose is to spend time with friends and relatives."

Finally, as already noted, anyone whose only pleasure trip was a type 1 (to visit friends and relatives) was not classified as a "Primary Pleasure Traveller." Only those who took a trip of types 2-8 were so classified.

HIGHLIGHTS

Approximately three-quarters (74%) of all U.S. residents (16 years old or older) took at least one pleasure trip in the past 12 months during which they travelled more than 100 miles and stayed at least one night away from home, for some purpose other than to visit a relative or friend.

They took an average of 3.6 such trips a year, lasting more than four days.

The Primary Pleasure Travel (PPT) market, therefore, projects to 136 million persons, 490 million trips, and 2 billion person-nights.

The 4.1 day average stay per trip also varied considerably by type-of-trip, as one would expect. For example, Touring trips averaged 8.0 nights, Cruises, 6.3, and Resort trips, 5.0.

On the average, PPT travellers spent 1-2 months planning their trips and 26% spent three or more months planning. Impulse travellers (that is, those who did their planning on their departure date) comprised only 7% of the PPT market. There were considerable differences by type of trip. For example, 55% of the Cruises were planned three or more months ahead while only 16% of the Close-to-Home, 18% of the City trips and 19% of the Outdoor trips were planned that far ahead.

PPT travellers are more likely to travel in groups than they are to travel alone or in pairs. Only 6% travelled by themselves and only another 29% travelled only with a "spouse or partner." This is particularly true of the visitors to Theme Parks (which includes special events.) Only 3% of the persons taking this kind of trip travelled alone and only 20% travelled only with a spouse/partner.

In general, people living in one part of the country were just as likely to have taken a pleasure trip in the last 12 months as were those living in some other part of the country. Age, sex and education, also bore little, if any, relation to being or not being in the PPT market.

However, there were some interesting differences for the individual trip-types. For example: 41% of the Theme Park travellers lived in the South whereas only 32% of all PPTs lived in the South; Men outnumbered women 55% to 44% as Outdoor travellers but women equalled or exceeded men on most of the other trip-types; 51% of the Cruise travellers were high school graduates (with no further training), compared to 38% for all PPTs; 49% of the Resort travellers had at least some college education and 25% were college graduates, compared to 41% and 19% respectively for the entire PPT market.

Two out of three persons in the PPT market were married.

The PPT market is somewhat upscale, in income. According to 1984 Census figures, the average (median) household income was $22,415. The average (median) household income for the PTTs who answered the question was $28, 417. (It should be noted that 18% of the sample did not provide income data). Forty-nine percent of the PPT market earned $25,000 or more and 13% had total household earnings of $50,000 or more. With reference to the individual trip-types, 19% of the Resort travellers and 16% of the Cruise travellers had household incomes of $50,000 or more.

As could be expected, motels (34%) and hotels (26%) were the accommodations more frequently used by these travellers. There were, however, considerable differences by type of trip. Touring, City Trip and Theme Park travellers were above average in their use of motels and hotels but few Outdoor travellers used either (9% used motels, 3% used hotels for lodging during their trip).

Sixteen percent of the PPT market flew; 15% had their trip booked by a travel agent; 13% used a package trip and 8% rented a car. Again, the differences by type of trip were considerable. For example, 41% of the Cruise, 29% of the Resort, 27% of the Touring and 21% of the City Trip travellers flew but only 4% of the Outdoor and 3% of the Close-to-Home travellers did so.

Only six airlines were used by 5% of more of the flyers. They were: Eastern (12%), Delta and United (11%), American (10%), TWA and Western (5%).

Friends (mentioned by 49% of the PPTs) and Travel Agents (12% mention) ranked at the top of the list of the sources consulted for information prior to making the trip.

Newspapers and Travel Magazines (mentioned by 8%) tied for first place among the media sources used and Television ranked third (5% mention). While there was a great deal of multiple use of media sources, Newspapers and Travel Magazine users were least likely to have consulted other media.

Some interesting differences appear when one examines media use by those who took a long time to plan their trip (that is, those who took a month or more to plan the trip) and those who took a shorter time to plan the trip. Newspapers ranks first (with 7% mention) and Television ranks second (with 6% mention) among those who took less than a month to plan their trip. Travel Magazines (with 11% mention) ranks first and Newspapers (with 8% mention) ranks second among those who took a month or more to plan the trip.

As mentioned earlier, a great deal of information was gathered on seven of the trip types (Close-to-Home, Touring, City Trip, Outdoors Trip, Resort Trip, Cruise and Theme

Park. See pages 5 and 6 for a description of these labels). Three characteristics stand out. Every one of the seven groups contained more married people that it did people who were single, widowed, divorced, etc. Each group's family income was above the U.S. average of $22,415 and very few of any of the groups took a trip alone.

The other characteristics that distinguished each group from the total were as follows:

CLOSE-TO-HOME pleasure travellers, compared to all PPTs, took shorter trips, did not spend as much time planning the trip, were more likely to plan to take the same kind of trip in the next two years.

Few of the Close-to-Home travellers consulted a travel agent, flew or rented a car. They stayed in motels to a greater extent than hotels. Newspapers and magazines were the media the Close-to-Home travellers consulted the most.

TOURING pleasure travellers, compared to other PPTs, took longer trips, planned ahead more frequently, used package trips, hotels, motels, airlines and car rentals to a greater extent.

Touring travellers were less likely to live in the South or the West, were somewhat older than and not as well educated as other PPTs. Travel magazines and newspapers were the media most frequently consulted by the members of this group.

CITY TRIP pleasure travellers, compared to all PPTs, took shorter trips, were not as likely to plan ahead or to plan to take the same kind of trip in the next two years.

City Trip PPTs were above average users of hotels and airlines, average users of motels. The group contained an above average percent of Hispanics and single people. Few of the City Trip PPTs consulted a travel agent while planning the trip. Travel magazines and newspapers were the media most frequently consulted.

OUTDOOR pleasure travellers, compared to all PPTs, took shorter trips, spent less time planning the trip, were least likely to consult the mass media while planning their trip.

Outdoor PPTs were not as likely to live in the South or the West as and were less well educated and younger than other PPTs. Very few of the Outdoor travellers stayed in a hotel or motel. Two out of three stayed in a campground/trailer park. Few of them flew or rented a car. Travel magazines and newspapers were the mass media most often consulted.

RESORT pleasure travellers, compared to all PPTs, took longer trips, planned ahead, used package trips, flew, rented cars and consulted travel agents more frequently.

Resort PPTs stayed in hotels to a greater extent than they stayed in motels. They were considerably above average in income, somewhat above average in education, below average in the percent of Hispanics. They consulted mass media to a greater extent than other PPTs. Travel magazines and newspapers were the media most frequently consulted.

CRUISE PPTs, compared to all PPTs, took longer trips and were more apt to plan ahead, to fly and to rent a car. The group contained somewhat more Southerners and people from the West and somewhat fewer college educated individuals than the other groups.

Two out of three Cruise PPTs consulted a travel agent. Six out of ten went on a package tour but only one out of three said they definitely would take a cruise again in the next two years. They were above average in the extent to which they consulted mass media and travel magazines and newspapers were the media most frequently consulted.

THEME PARK travellers, compared to all PPTs, took slightly shorter trips and were average in the amount of time spent planning the trip.

They were somewhat younger and more apt to come from the South than other PPTs. Theme Park PPTs were twice as apt as other PPTs to consult the mass media. Television and newspapers were the media most often consulted.

DETAILED FINDINGS

Overview

In the 12 month period preceding the Fall, 1985 interviews, 89% of the sample took one or more pleasure trips. However,15% only took a trip to visit friends or relatives. The Primary Pleasure Travel market, therefore, includes 74% of all US residents, 16+. These travellers took 3.6 trips during the year and spent an average of 4.1 nights on their trips.

Since there were in 1985 (according to Census Bureau statistics) some 183.01 million persons, 16-years-old or older, living in the United States, the figures for the PPT market project, approximately, as follows:

Number of PPTs	136 million
Number of PPT trips	490 million
Number of person-nights	2 billion

Table 1 includes the percentages for the individual types. The most common type was the trip to visit friends or relatives which was taken by 51% of the 16-years-old and older sample. Close-to-Home ranked second in popularity with 30% of the sample having taken one in the past year. The Touring trip ranked third (20%) and the Outdoors and the City Trip tied for fourth with 18%.

TABLE #1

PERCENT OF PPTs* TAKING A PARTICULAR TYPE OF VACATION TRIP IN THE PAST YEAR

	TOTAL
Base (All respondents)	(8873)
Visit Friends/ Relatives	51%
Close-to-Home	30
Touring trip	20
Outdoors trip	18
City trip	18
Resort trip	16
Theme Park	10
Cruise	2

NOTES:

All bases are unweighted.

Totals add to more than 100% because of multiple responses.

PPTs = Primary Pleasure Travellers

Length of Stay In Nights

Although Close-to-Home ranked first among the Primary Pleasure Travellers in percent taking a trip, it ranks at the bottom of the list (with an average stay of only 2.7 nights compared to 4.1 for all trips) in terms of average length of stay. Touring (8.0), Cruises (6.3) and Resort (5.0) trips rank at the top of the list.

Fifty percent of the Cruise travellers stayed 6-10 nights and an additional 14% stayed longer than that. While only 27% of the Touring travellers stayed 6-10 nights, 30% stayed 11 nights or more, thereby accounting for the higher average for the Touring travellers.

TABLE # 2

LENGTH OF STAY IN NIGHTS

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All)								
PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
# of Nights:								
One	12%	15%	6%	18%	10%	6%	9%	22%
Two	18	24	9	22	19	11	6	24
Three	13	13	9	13	15	13	4	13
4-5	15	14	15	18	13	17	14	16
6-10	21	16	27	14	21	33	50	15
11-15	8	5	15	4	8	9	10	4
16-20	2	3	4	2	3	1	1	**
21+	7	7	11	4	8	5	3	2
No answer	4	3	4	5	3	5	3	4
Average***	4.1	2.7	8.0	3.3	3.4	5.0	6.3	3.9

NOTES:

All bases are unweighted.

*PPTs = Primary Pleasure Travellers

** = Less than 0.5%.

*** Data taken from Tourism Canada report.

When Planning Started for Trip

On the average, PPTs spent 1-2 months planning their trip but 7% did their planning on the "same day as departure."

There are considerable differences by type of trip. For example, more time was spent planning the Cruise, Touring and Resort trips than was spent planning the other types of trips. 55% of the Cruise trips were planned three or more months in advance whereas only 16% of the Close-to-Home, 18% of the City and 19% of the Outdoor trips were planned that far ahead.

Eleven percent of the Close-to-Home and 9% of the Outdoor trips were planned on the same day as departure.

TABLE #3

WHEN PLANNING FOR TRIP BY PPTs STARTED

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
3+ mos ago	26%	16%	40%	18%	19%	39%	55%	27%
1-2 mos	27	23	29	31	24	33	15	27
2-3 wks	18	19	14	19	21	15	18	18
One wk	21	30	12	25	27	11	7	21
Same day	7	11	4	6	9	2	5	4
No answer	1	0	1	1	0	0	0	0
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

NOTES:

All bases are unweighted.

*PPTs = Primary Pleasure Travellers

With Whom PPTs Travelled

Only 6% of the Primary Pleasure Travellers (PPTs) said they travelled alone on their trip. For the individual trip types, this figure ranged from a high of 11% (City Trip) to a low of 3% (Outdoor, Resort, Cruise and Theme Park).

Twenty-nine percent travelled only with a spouse/partner. Cruise travellers (37%) were most likely and Outdoor and Theme Park travellers (20%) were least likely to give this response

Forty-eight percent travelled with family (including the spouse/partner, other family members and/or friends). With respect to the individual trip types, this ranged from a high of 59% (Theme Park) to a low of 40% (City and Close-to-Home).

TABLE #4

WITH WHOM PPTs TRAVELLED

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
Travelled:								
Alone	6%	5%	7%	11%	3%	3%	3%	3%
Only with S/P**	29	30	34	31	20	33	37	20
Only with friends	16	15	13	17	22	15	17	16
Family+***	48	49	45	40	55	48	40	59
No answer	1	1	1	1	--	1	3	2
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

NOTES:

All bases are unweighted

*PPTs = Primary Pleasure Travellers

**S/P = Spouse or partner.

***The "Family+" category consists of those who said they travelled with spouse/partner and friends; with other family members and/or with both family and friends.

Kind of Trips Will Take in Next 2 Years

All Personal Pleasure Travellers (PPTs) were asked, using a five point scale, whether they would or would not take each of the eight types of trips in the next two years. The percent saying that they "definitely would" take a particular type was tabulated.

The Visit to Friends/Relatives and the Close-to-Home trips were by far the most popular options for a vacation "in the next two years " with 57% saying they definitely would visit friends/relatives and 46% saying they definitely would take a Close-to-Home vacation. Outdoors ranked a distant third at 24% while four others clustered together (City Trip, 20%; Touring, 19%; Resort, 17%; Theme Park, 13%). Only 5% said they definitely would take a Cruise in the next two years.

Some measure of "loyalty" to a particular type of trip can be obtained by calculating the percent who said they definitely would take the same kind of trip in the next two years that they had taken in the past year. Forty-four percent of the all PPTs responded in this fashion. The Close-to-Home and the Outdoor travellers were the most loyal with 60% and 59% of each group saying they definitely would take the same kind of trip in the next two years. The Theme Park and the Cruise travellers were the least loyal. Only 26% and 29% of each group said they definitely would take the same kind of trip in the next two years.

TABLE #5

KIND OF TRIP PPTs DEFINITELY WOULD TAKE IN NEXT TWO YEARS

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
Visit F/R	57%	58%	54%	59%	58%	54%	58%	56%
Close home	46	60	36	42	44	40	41	44
Touring	19	18	31	13	17	16	23	16
City trip	20	16	17	32	16	20	23	20
Outdoor	24	24	15	15	59	17	24	18
Resort	17	14	10	12	12	42	19	13
Cruise	5	7	5	4	1	6	29	4
Theme Park	13	13	9	12	10	12	23	26
SAME TRIP	44%	60%	31%	32%	59%	42%	29%	26%

NOTES:

All bases are unweighted.

*PPT = Primary Pleasure Travellers

F/R = friends or relatives

Totals add to more than 100% because of multiple responses.

Sources of Information

All PPTs were asked "While you were planning this trip, which if any of the following information sources did you use? Please indicate as many as apply." They were then handed a card containing the following sources:

"Recommendations of acquaintances/friends/relatives; Newspapers; General magazines; Travel magazines; Books; Television; Radio; Documentary travel films; Travel agent; Tourist office; Airline or other commercial carrier; Others (specify); None of the above."

Twenty-six percent of all PPTs responded "none of the above" to the sources of information question. Close-to-Home travellers (36%) were most likely to say this while Cruise travellers (7%), who apparently rely more heavily on advice than the other groups, were least likely to respond in this fashion.

Two non-media sources -- Friends (49%) and Travel Agents (12%) were the ones cited most frequently as sources. Newspapers and Travel Magazines ranked first among the media sources, each being mentioned by 8% of all PPTs. The types of travellers most likely to consult newspapers were Theme Park (15%), Cruise (14%) and the City Trip (11%) travellers.

Twenty percent of all PPTs mentioned consulting at least one mass medium. Among that number, 38% mentioned

Newspapers or Travel Magazines. The percents mentioning the other media were: TV (26%); General Magazines (17%); Books (12%); Radio (12%) and Travel Films (4%). The travellers most likely to utilize a mass media source were Resort (38%), Theme Park (36%) and Cruise (31%). The Outdoor (13%) and the Close-to-Home (15%) groups were the least likely to utilize mass media as a source of information for their upcoming trip.

There was a great deal of multiple use of media sources. For example, 45% of those who used Radio also consulted TV; 38% of the General Magazine users also consulted TV and 36% also consulted Newspapers. Newspaper and Travel Magazine users were the ones least likely to consult other media while General Magazine and Book users were the ones most likely to do so.

The mass media data were also examined by two key characteristics -- the length of time taken to plan the trip and whether or not the respondent "played a major role" in deciding where to go.

Forty-eight percent of all PPTs took less than a month and 51% took a month or more to plan their trip. One percent did not answer the question. Some interesting différences emerged. Planning time was not related to Newspaper use but it was related to the use of Travel

Magazines. Only 4% of the "Short" planners consulted Travel Magazines but 11% of the "Long" (one month or more) planners did so. As a consequence, Newspaper and Television ranked one-two among the Short planners while Travel Magazines and Newspaper ranked one-two among the "Long" planners.

With reference to the other question, the rank order and the percents who consulted the individual mass media were the same among all PPTs and among the 69% who said they played a major role in deciding where to go on the vacation trip. In other words, decision-makers apparently utilized the mass media to the same extent and in the same manner as the non-decision makers.

TABLE #6

SOURCES OF INFORMATION FOR A RANDOMLY SELECTED TRIP TAKEN IN LAST 12 MONTHS

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All) PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
MEDIA:	20%	15%	25%	22%	13%	38%	31%	36%
Newspapers	8%	6%	8%	11%	4%	6%	14%	15%
Gen mags	3	2	5	4	2	3	9	6
Travel mag	8	5	13	6	6	10	15	9
Books	2	2	5	1	1	3	2	3
TV	5	3	5	6	2	3	12	18
Radio	2	2	2	4	2	1	3	7
Travel films	1	0	1	0	2	0	8	1
NON-MEDIA:								
Friend/rel	49	45	49	56	53	47	51	52
Trav agent	12	4	15	10	3	23	67	14
Tourist off	3	2	5	2	2	4	5	3
Airlines**	4	1	4	6	0	7	10	4
NONE	26	36	19	26	30	22	7	18

NOTES:

All bases are unweighted. Percents add to more than 100 because of multiple responses. *PPT = Primary Pleasure Travellers. **Includes other carriers.

TABLE #7

DUPLICATE USE OF SELECTED MEDIA AS SOURCES OF INFORMATION IN PLANNING A TRIP

	News	Trav Mags	TV	Gen Mags	Books	Radio
Base*	(493)	(452)	(280)	(197)	(152)	(130)
Newspapers	--	20%	34%	36%	26%	35%
Travel mag	20	--	20	38	39	14
TV	23	13	--	23	18	45
Gen mags	16	17	15	--	23	12
Books	8	12	8	16	--	7
Radio	11	17	21	9	7	--
AVERAGE DUPLICATION	16%	16%	20%	24%	23%	19%

NOTES:

All bases are unweighted

*Base = number of persons using a particular medium as a source of information for a randomly selected pleasure trip, if person took more than one during the past 12 months.

Percentages add to more than 100 because of multiple mentions.

TABLE 7A

MASS MEDIA SOURCES OF INFORMATION USED BY THOSE PPTS WHO TOOK A SHORT VS THOSE WHO TOOK A LONG TIME TO PLAN THE TRIP AND BY THOSE WHO PLAYED A MAJOR ROLE IN DECIDING WHERE TO GO

		Planning Time**		Played
Base(All)	TOTAL	Short	Long	Major Role
PPTs*)	(6182)	(2962)	(3158)	(4281)
Newspapers	8%	7%	8%	8%
Gen. mags	3	2	5	3
Travel mags	8	4	11	8
Books	2	1	4	3
TV	5	7	4	5
Radio	2	2	2	2
Travel films	1	1	0	1

NOTES:

All bases are unweighted.

*PPT = Primary Pleasure Travellers

**Planning Time/ Short = Less than one month;
Long = one month or more.

Satisfaction with Information Received

PPTs who reported asking Travel Agents, Tourist Offices or Airlines (or some other commercial carrier) for information were asked whether or not they were satisfied with the information they received.

The vast majority (more than 90%) said they were satisfied. Differences by type of trip were not, in general, very great and should be interpreted cautiously because of the small bases. However, it is interesting to note that City Trip travellers reported the lowest degree of satisfaction. Only 73% of the City Trip travellers, for example, were satisfied with Tourist Office information whereas 98% of the Resort travellers and 92% of all PPTs were satisfied with the information they received from a Tourist Office.

TABLE #8

PERCENT SATISFIED WITH INFORMATION

FROM: TRAVEL AGENT

	TOTAL	Close home	Tour-ing	City trip	Out-door	Re-sort	Cru-ise	Theme Park
Base*	(770)	(71)	(165)	(123)	(15)	(246)	(71)	(76)
	91%	86%	92%	90%	83%	92%	98%	92%

TABLE #9

PERCENT SATISFIED WITH INFORMATION

FROM: TOURIST OFFICES

	TOTAL	Close home	Tour-ing	City trip	Out-door	Re-sort	Cru-ise	Theme Park
Base*	(205)	(35)	(56)	(29)	(15)	(43)	(9)	(17)
	92%	90%	94%	73%	95%	98%	88%	93%

NOTES:

All bases are unweighted

*Base = those who mentioned using a particular service

TABLE #10

PERCENT SATISFIED WITH INFORMATION

FROM: AIRLINES OR OTHER CARRIERS

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base*	(256)	(28)	(52)	(77)	(2)	(70)	(10)	(16)
	90%	96%	82%	85%	100%	97%	95%	89%

NOTES:

All bases are unweighted.

*Base = those who mentioned using a particular service

Where PPTs Live

Where a person lived bore little relationship to his/her being classified as a Primary Pleasure Traveller (PPT). PPTs distributed across the country in much the same fashion as all persons interviewed for this study and, in fact, in much the same fashion as the nation at large, as indicated by Census figures.

There were, however, some interesting differences by trip type. For example:

-- 31% of the Touring group lived in the Northeast (compared to 24% for all PPTs)

-- 35% of the City Trip group lived in the South (compared to 32% for all PPTs)

-- 34% and 28% of the Resort group lived in the South and Northeast respectively (compared to 32% and 24% for all PPTs.

-- 37% and 24% of the Cruise travellers lived in the South and West (compared to 32% and 20% for all PPTs).

-- 41% of the Theme Park (and other special events) visitors lived in the South (compared to 32% for all PPTs)

TABLE #11

REGION OF THE COUNTRY

	All Rs	All PPTs	Census Data
Base	(8873)	(6182)	---
Northeast	23%	24%	22%
North Central	25	24	25
South	32	32	34
West	20	20	19
TOTAL	100%	100%	100%

NOTES:

All bases are unweighted

Rs = respondents; PPT = Primary Pleasure Travellers

Source of Census data: Statistical Abstracts of the United States: 1986 (106th ed), Washington, D.C., 1985 Data are for 1984 and for all residents, 18+. Data for persons 16-18 were not included in this report.

TABLE #12

REGION OF THE COUNTRY FOR EACH TRIP TYPE

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All)								
PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
Northeast	24%	22%	31%	21%	23%	28%	17%	18%
North Cen.	24	23	24	25	29	21	22	27
South	32	34	28	35	22	34	37	41
West	20	22	17	19	25	17	24	15
No answer	--	0	0	0	1	0	0	0
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

NOTES:

All bases are unweighted.

*PPTs = Primary Pleasure Travellers

Age Distribution

Age data were obtained from all 8873 respondents. As with region, the differences between the Primary Pleasure Travel (PPT) market and all respondents were quite small. The differences among some of the individual trip types, however were fairly large. For example:

-- 47% of the Cruise and 40% of the Touring group were 51 or older (compared to 29% for all PPTs)

-- 57% of the Outdoor and 52% of the Theme Park travellers were 16-35 (compared to 47% for all PPTs).

Thus, it would appear that the Cruise and Touring trips attract a somewhat older while the Outdoor and Theme Park trips attract a somewhat younger pleasure traveller.

TABLE #13

AGE OF PPTs AND ALL RESPONDENTS

	All Rs	All PPTs
Base	(8873)	(6182)
16-25 yrs	22%	23%
26-35	24	24
36-50	23	24
51-65	20	20
66+	10	9
No answer	1	--
TOTAL	100%	100%

NOTES:

All bases are unweighted

PPTs = Primary Pleasure Travellers

Rs = respondents

TABLE #14

AGE OF PRIMARY PLEASURE TRAVELLERS

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All) PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
16-25 yrs	23%	21%	17%	28%	26%	23%	11%	27%
26-35	24	26	20	21	31	23	20	25
36-50	24	25	22	22	21	25	22	28
51-65	20	20	26	19	16	19	35	12
66+	9	7	14	10	5	10	12	6
No An.	--	1	1	0	1	0	0	2
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

NOTES:

All bases are unweighted.

*PPTs = Primary Pleasure Travellers

Sex of Respondents

Sex was also ascertained of all respondents. Overall, the differences were small. Women comprised 52% of all respondents and 50% of the Primary Pleasure Travel (PPT) market. Women comprised 52% of those taking a Close-to-Home, Touring or City trip but only 44% of the Outdoor travellers.

TABLE #15

SEX OF ALL RESPONDENTS AND ALL PPTs*

	All Rs**	All PPTs*
Base	(8873)	(6182)
Male	48%	49%
Female	52	50
No answer	-	1
TOTAL	100%	100%

NOTES:

All bases are unweighted

*PPTs = Primary Pleasure Travellers

**Rs = Respondents

TABLE #16

SEX OF PRIMARY PLEASURE TRAVELLERS

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All) PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
Male	49%	48%	48%	48%	55%	50%	51%	48%
Female	50	52	52	52	44	50	49	47
No answer	1	0	0	0	1	0	0	5
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

NOTES

All bases are unweighted.

*PPTs = Primary Pleasure Travellers

Marital Status of PPTs

Two-thirds of the Primary Personal Travellers (PPTs) were married. These data were not gathered among all respondents so no such comparison is possible. However, it is interesting to note that according to 1985 Census data 63% of those 18+ were married. Thus, marital status does not appear to be a major factor in being (or not being) classified as a PPT.

From 60% to 70% of the people taking the various types of trips were married.

Singles (never married) comprised 28% of the City, 27% of the Theme Park, 26% of the Outdoor and only 19% of the Touring market (compared to 24% for all PPTs).

Nine percent of the total PPT market were "separated, divorced or widowed." The range for the individual trip types was from 7% (Outdoor, Resort and Theme Park) to 11% (Touring, City Trip and Cruise).

TABLE #17

MARITAL STATUS OF THE PPTs*

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All) PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
Single	24%	22%	19%	28%	26%	24%	22%	27%
Married	67	69	70	60	67	69	67	63
S/D/W**	9	9	11	11	7	7	11	7
No answer	--	0	--	1	--	--	0	3
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

NOTES:

All bases are unweighted.

*PPTs = Primary Pleasure Travellers

**S/D/W = Separated, divorced or widowed.

Education of PPTs

Nineteen percent of the Primary Pleasure Travellers completed college or some graduate training. Another 22% had some college training while 38% were high school graduates.

Education, however, does not appear to be a factor in being a PPT since the PPT education distribution paralleled in most respects that of all US residents (25+) as reported by the Census Bureau for 1984 (the latest date for which such data were available). The only major differences were in the higher percentages reporting 1-3 years of college (22% for PPTs to 16% for Census), and the corresponding lower percentages who did not complete high school (20% for PPTs to 27% for the Census). However, this difference may well be due to the fact that the travel study was done among persons, 16+. The Census Bureau report was for an older (25+) population and the younger group (16-24) has a fairly high "in school" figure.

There are a few notable differences among the trip types. For example, 51% of the Cruise travellers were high school graduates, compared to 38% for all PPTs; 49% of the Resort group had at least some college and 25% were college grads, compared to 41% and 19% for all PPTs respectively.

TABLE #18

EDUCATION OF PRIMARY PLEASURE TRAVELLERS

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All) PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
Less than HS grad	20%	19%	22%	24%	21%	15%	12%	19%
HS grad	38	37	41	35	43	36	51	37
Some col	22	24	18	23	21	24	22	18
Col grad+	19	20	17	17	15	25	12	23
No answer	1	--	1	1	--	--	3	3
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

NOTES:

All bases are unweighted.

*PPTs = Primary Pleasure Travellers

Income (Total Household) of PPTs

The Primary Pleasure Travel (PPT) market is somewhat upscale. According to Census figures, the average (median) household in the United States earned $22,415 in 1984. Forty-nine percent of PPTs earned more than that with 13% reporting total household earnings of $50,000 or more.

This upscale skew is especially noticeable among the Resort and Cruise travellers where 19% of the former and 16% of the latter reported household incomes of $50,000 or more.

It should also be noted that 18% of the PPTs did not respond to the household income question.

TABLE #19

HOUSEHOLD INCOME (IN THOUSANDS) OF PRIMARY PLEASURE TRAVELLERS

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All) PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
Income(000):								
Below $15	14%	15%	18%	19%	15%	9%	4%	9%
$15-$24	19	21	18	20	20	15	22	23
$25-$49	36	36	34	32	36	41	36	37
$50+	13	12	12	9	12	19	16	12
No answer	18	16	18	19	17	16	22	19
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

NOTES:

All bases are unweighted.

*PPTs = Primary Pleasure Travellers

Spanish or Hispanic Origin of PPTs

According to Census Bureau statistics in 1985 6% of the resident U.S. population, 18+, were of Spanish origin. The Census Bureau does not publish data for the Spanish-origin, 16+. Since 7% of the PPTs were of Spanish origin, it would appear that this factor bore little relation to being or not being in the PPT market.

With reference to the individual trip types, from 3% of the Resort group to 11% of the City Trip travellers were of Spanish origin.

TABLE #20

HISPANIC ORIGIN OF PPT MARKET*

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
Hispanic								
Yes	7%	6%	8%	11%	6%	3%	9%	9%
No	93	93	91	89	94	96	91	90
No answer	--	1	1	0	0	1	0	1
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

NOTES:

All bases are unweighted.

*PPTs = Primary Pleasure Travellers

Accommodations Used by PPTs

Primary Pleasure Travellers (PPTs) were asked "what type(s) of accommodation did you use on this trip" (the trip randomly selected for intensive interviewing). They were shown a list and urged to mention all that they used on the trip in question.

Motels (34%) and Hotels (26%) were the accommodations most frequently mentioned. The "home of a friend or relative" (16%) and campground/trailer park (15%) were next in frequency of mention.

There were considerable differences by type of pleasure trip. Outdoor travellers were not heavy users of hotels or motels. Only 3% used hotels and 9% used mptels. the vast majority (65%) used campground/trailer park accommodations. All of the other types were reasonably heavy users of hotels or motels and three groups -- Touring, City Trip and Theme Park --were above average in their use of hotels/motels.

It should be noted that only 72% of the Cruise travellers reported using a cruise ship as an accommodation on this trip. The remainder probably mentioned "cruise ship" when asked an earlier question about the type(s) or transportation used to get to and from their destination. Sixty-two percent mentioned using a cruise ship to get them to and from their destination.

TABLE #21

ACCOMMODATIONS USED BY PPT MARKET*

	TOTAL	Close home	Tour-ing	City trip	Out-door	Re-sort	Cru-ise	Theme Park
Base(All) PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
Home of friend/rel	16%	16%	20%	28%	5%	6%	7%	19%
Hotel	26	17	38	39	3	31	28	33
Motel	34	36	49	35	9	26	16	45
Resort Lodge	5	4	5	1	2	13	6	1
Campground/ Trail park	15	12	9	4	65	4	1	6
Cruise Ship	1	--	--	0	0	--	72	--

NOTES:

All bases are unweighted.

*PPTs = Primary Pleasure Travellers

Percentages add to more than 100 because of multiple mentions

Other Services Used by PPTs

Sixteen percent of the Primary Pleasure Travel (PPT) market flew on their trip; 15% let a travel agent book all or part of the trip; 13% used a package trip and 8% rented a car.

There were great differences by type of trip. For example, 64% of the Cruise, 27% of the Touring and 26% of the Resort travellers let a travel agent book all or part of the trip but only 3% of the Close-to-Home and 2% of the Outdoor travellers did so. Forty-one percent of the Cruise, 29% of the Resort, 27% of the Touring and 21% of the City Trip travellers flew but only 4% of the Outdoor and 3% of the Close-to-Home travellers did so.

The 16% who flew were also asked what airline did they use. The airlines mentioned by at least 5% of the flyers were:

-- Eastern (12%); Delta and United (11%)

-- American (10%), TWA and Western (5%)

Pam Am was mentioned by 4% of the flyers.

TABLE #22

OTHER SERVICES USED BY THE PPT MARKET

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All PPTs*)	(6182)	(1743)	(1041)	(1051)	(769)	(1020)	(115)	(478)
Airplane	16%	3%	27%	21%	4%	29%	41%	13%
Car rental	8	2	12	6	2	16	13	9
Trav agent	15	3	27	14	2	26	64	14
Pack trip	13	5	23	10	5	20	60	13

NOTES:

All bases are unweighted.

*PPTs = Primary Pleasure Travellers

Percentages may add to more than 100 because of multiple mentions

TABLE #23

AIRLINES USED BY 5% OF PPT* FLYERS

	TOTAL	Close home	Touring	City trip	Outdoor	Resort	Cruise	Theme Park
Base(All) Flyers)	(1094)	(72)	(304)	(238)	(22)	(312)	(63)	(82)
American	10%	4%	12%	5%	0%	13%	8%	7%
Delta	11	16	6	11	2	15	10	21
Eastern	12	6	9	12	0	15	24	18
TWA	5	2	8	5	0	2	7	5
United	11	10	12	7	7	13	21	11
Western	5	8	2	3	6	9	4	0

NOTES:

All bases are unweighted.

*PPT = Primary Pleasure Travellers

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12/87

CABLE HOME SHOPPING

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New York, New York 10036
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CABLE HOME SHOPPING

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

October 1987

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CONTENTS

	Page
INTRODUCTION	1
HOW THE STUDY WAS DONE	4
SUMMARY OF FINDINGS	6
CONCLUSIONS	7
FINDINGS	9
1. How many have cable home shopping?	9
2. How many watch?	9
3. How many buy?	10
4. Is there repeat business?	11
5. How many families buy per month?	11
6. Is the number of purchases per month related to the time the channel has been available?	12
7. What is the best guess about future sales of cable home shopping?	13
8. What do consumers get out of cable home shopping?	14
9. What is the mix of merchandise advertised and sold?	15
10. How does cable home shopping relate to catalog shopping?	15
11. What is the sales volume of cable home shopping?	16
TABLES	18
Precision of the Figures in the Sample	22
APPENDIX	23

INTRODUCTION

In the last few years, cable home shopping has increased dramatically. As the TV viewer sees it, the procedure is simple: you turn on the television, watch a spokesperson displaying merchandise, and then, if you wish, call a number on the screen to order. You give your credit card number for payment and a few weeks later the merchandise arrives. If you don't like it, you can return it.

Often the merchandise can be ordered only for a short time after it is shown on the screen. Although referred to here as cable home shopping, the same procedure is being used on broadcast channels as well. In some cases, part of the time is devoted to entertainment while in other cases, all of the time is devoted to displaying merchandise.

There are many questions about cable home shopping:

- Do customers like it?
- Is this a threat to traditional merchants?
- Is this a threat to other advertising media?
- Is it a fad?

For how long will the business continue to grow at this rate?
Who are the purchasers and what are they like?
What is being sold?

These questions raise still more questions. Whether it is a threat depends on its volume of business and whether it maintains itself instead of fizzling out like previous fads. Whether it maintains itself depends on both whether present viewers continue to buy and also whether the availability of channels is maintained or grows.

Cable home shopping is now big business. Paul Kagan Associates Inc. has estimated that home shopping sales for 1987 will be $1.75 billion. The same source estimates sales for 1985 as $91 million and for 1986 as $450 million. As each new cable system adds a home shopping channel, coverage increases. (Often the cable operator is reimbursed with 5% of the sales). The same source also estimates coverage of all U.S. homes as 3% in 1985; 13% in '86 and 46% in '87. Some of these figures are cited in Home Furnishings Daily, 4/6/87, p.14, while others come from a presentation by Lawrence Gerbrandt at the summer 1987 INAME Conference as reported in Newspaper Marketing, September, 1987.

The same Home Furnishings Daily article quotes the president of the second largest video retailer (Cable Value Network or CVN) as saying, "Merchandise has to be first quality and shipable, holding high perceived value while being sold at substantial discount, allowing us meaningful margins."

In that case, perhaps the merchants most threatened would be the specialized (rather than full line) discounters who offer few services to the customer. (These are the stores featuring bare walls, top-line factory-sealed merchandise and low prices).

Paul Kagan Associates also report estimates of annualized revenue to Home Shopping Network (one of the major home shopping networks) of $535 per buyer (Home Shopping Investor, April 22, 1987, p.7). They cite quarterly revenue of $134 per buyer. A Media Buying Associates study, as reported in Marketing and Media Decisions (March 1987), suggests that a viewer's average expenditure per item is about $40 and that the buyers are more upscale and better educated than one might guess. Friedman of Homans, Trull, Valeo and Co is cited in Business Week for 3/30/87 as saying that sales for the first quarter after the cable channel becomes available may be $200 per household while the third quarter average sale may be $100. Merchandise returns are reported to be high. One cable shopping company has gone bankrupt already.

HOW THE STUDY WAS DONE

There were two surveys. Both were conducted by Opinion Research Corporation, by way of their Telephone Caravan Survey (which puts questions from several sponsors into the same questionnaire). The sample for each survey was made up of about 500 men and 500 women, selected by random probability methods from the country as a whole. Each sample represents the total population of all adults in the country. All interviewing was conducted in the spring of 1987: one study in early March and the second in early May.

The first study was sponsored by ORC. Some of their data were released for public use.

The second survey was carried out according to specifications by the Newspaper Advertising Bureau. Some of the questions used were identical to those used in ORC's first survey. Copies of the questions used in both studies are in the appendix.

Since most of the questions were asked in one study but not the other, typically, data reported here are based on one study or the other, but not both. The questions asked in both studies are whether the respondent watched and purchased. The details of sampling precision can be found just before the Appendix.

Cable home shopping might be considered analogous to a new product. The classic means of estimating the future success of a new product is to measure both consumer acceptance of the product and also the repeat purchase rate. In such a study, it is also usually valuable to find out something about the satisfactions provided by the new product and the demographic characteristics of the users. These two studies provide some of that information.

SUMMARY OF FINDINGS

A sizable proportion (perhaps about 60%) of American households had cable shopping available at the time of interviewing (Spring 1987).

Among those who have cable home shopping available to them, about half (57%) have ever watched. This proportion could be expected to rise, with time, among those who have cable home shopping available.

A small proportion (10% to 20%) of those who have cable home shopping available bought something from it in the last year. Only one percent or so of those families make a purchase in any given month. When the same families are taken as a proportion of all U.S. families, both with and without cable, about 5% bought at least once in the last twelve months.

This is not a one-purchase-and-then-never-again phenomenon. The average purchaser made 2.39 purchases in the last twelve months.

The number of purchases per month is highest for those for whom cable home shopping is new: about one and a half purchases per month among those who had cable home shopping for three months or less. The rate of purchasing drops to the rate of about one purchase every six months by the time a family has had cable home shopping for a year.

The mix of products perceived to be advertised on cable home shopping is not the mix of products reported bought.

Despite the possibility of being cheated, one of the motivations of watching is entertainment.

CONCLUSIONS

The business could be expected to peak and then subside.

Few individuals buy much. Cable television, because it is time-bound, is not suitable for an efficient search for specific products. Stores are.

Those who buy the most are likely to be those consumers who both use catalogs regularly and also enjoy this kind of television.

These studies were not designed to measure total U.S. sales volume of cable home shopping. However, findings from this study on the number of purchases last year can be used to flesh out some of the projections by others.

> National sales volume would be at an annual rate of between $695 million and $1,025 million if the average purchase were $40. If

the average buyer spends $535 a year, then the average purchase would be $224 and annual national sales would be about $4,815 million. In order for a sales volume to be $1,750 million, the average purchase would have to be about $81.

FINDINGS

1. How many have cable home shopping?

A sizable proportion (perhaps as many as 60%) of American households have cable shopping available.

> In response to a question in the ORC survey, 71% said they were familiar with home shopping on TV. In the NAB survey, 61% of the respondents said they have cable home shopping.
>
> How are these two numbers to be reconciled? If some respondents had seen it away from home or on broadcast or had heard about it but never seen it, then the ORC 71% would overestimate the proportion who have cable shopping available to them on their own television sets. Furthermore, these are telephone samples and therefore, given the slightly upscale bias of telephone samples, probably fewer than 61% of the households in the population have it.

2. How many watch?

Among those who have cable home shopping available, about half (57%)

have ever watched (NAB study). This proportion could be expected to rise, with time.

A similar question in the ORC survey led to about the same proportion. Of those who said they were familiar with home shopping programs, 54% reported that they themselves had watched at some time in the past. The comparable figure for anyone in the household is 60%.

About half (51%) of those with cable home shopping available have had it available for less than a year. As people get more used to the idea and occasionally see cable home shopping on the screen, this proportion of those who have ever watched could be expected to rise.

Those most likely to watch are the young (67%) and the less well educated (71%). The better educated are less likely to watch (50%).

3. How many buy?

A small proportion (12% of respondents; 19% of the families) who have cable home shopping available bought something from it in the last year.

In one survey the proportion of adults who have purchased is 13%; in the other it is 12%. That's about one out of eight. Of those who watch (NAB study), blacks and those with less than a high school education are more likely to buy (27% and 20%, respectively). When the focus is shifted to households instead of individuals, the proportion who bought at least once in the last twelve months goes up to 19% (ORC study).

4. Is there repeat business?

This is not a one-purchase phenomenon.

It is not the case that people buy once, find they don't like what they have purchased and then decide never to buy again.

The average purchaser made 2.39 purchases in the last twelve months. That means there is repeat business. While purchasers sometimes return the merchandise, apparently that does not keep them from buying again.

5. How many families buy per month?

Of those families who have cable home shopping available, only one percent or so make a purchase in any given month.

Despite the clear benefit of comparing this statistic (percent of families buying per month) among those who recently gained access to cable home shopping to the same statistic among those who have had cable home shopping for a while, these data will not support detailed comparisons. The sample size is just too small to look at buyers per month among those who have had cable for one month, two months, three etc. However it is possible to make some comparisons.

6. Is the number of purchases per month related to the time the channel has been available?

Yes. Among those who purchase at all, the number of purchases per month is highest for those for whom cable home shopping is new. The rate of purchasing then drops. The relationship looks like a curve, not a straight line. It may level off by the time a family has had cable home shopping for a year. (See the chart following Table 3. The equation generated to fit the data is: $y=.14+\{[.719*(.903^{x})]*[1+((4-x)/(x+1))]\}$ where y is the number of purchases per month and x is the time in months that cable home shopping has been available. This equation accounts for 89% of the variance.)

Among those who buy at all, those who have had cable home shopping for less than three months make about one and a half purchases per month. Among those who have had cable home shopping for a year or more, purchasers buy at the rate of about one purchase every six or seven months. This is consistent with the concept behind Freidman's statement that $200 is spent in the first three months but only $100 in months six to nine.

7. What is the best guess about future sales of cable home shopping?

The business could be expected to peak and then subside.

Sales from a single cable operator's area begin when he introduces his first home shopping channel. With the passage of time, the sales volume should decline from that channel in that area as viewers reduce the rate at which they purchase. Therefore, in the aggregate, sales from all operators should show pattern of peaks and declines as channels are first introduced and then "age". In total, there should be an upward sawtooth trend in sales as cable home shopping availability increases.

In principle, this pattern of increases might continue until all households have a home shopping channel. At that point, sales would probably continue to slide until either an equilibrium is reached or until something else is introduced into the system.

In practice, as coverage approaches 100%, it is harder and harder to reach more households, so sales should slow even before 100% coverage is reached.

8. What do consumers get out of cable home shopping?

First of all, they get convenience and they usually get a low price. From the point of view of purely psychological satisfactions, it seems that one of the motivations is the entertainment of watching these shows and of buying. Only a limited set of questions on attitudes toward cable home shopping was used in these surveys.

Compared to those who watch but do not buy, buyers are more likely to say it is entertaining. In fact, at least one cable home shopping operator is including entertainment in all his air time. For none of the other attitude measures is there a statistically significant difference between buyers and those who are watchers but not buyers. Thus it is likely that none of these other items are related to satisfactions that are unique to the buyers. For instance, just as high a proportion of buyers as non-buyers say that the merchandise may not be what it seems to be.

9. What is the mix of merchandise advertised and sold?

The merchandise perceived to be advertised is not generally what is reported to be bought.

> About a third (34%) of the reports of cable home shopping watchers are that the goods advertised are either personal apparel, furniture or kitchen utensils. Perceptions of what is advertised do not match the reported purchases. Only a tenth (11%) of the purchases are from these categories.
>
> Almost half (45%) of the reports of watchers are that the offerings are jewelry or electronic/sound/video items. That is about the proportion (37%) of the purchases accounted for by these items. However, the items accounting for the remaining 21% of the reports of what is being advertised -- tools, toys, telephones, car equipment and the ubiquitous "other" category -- account for about half (52%) of the sales.

10. How does cable home shopping relate to catalog shopping?

Those who buy from cable home shopping are much more likely to have bought from catalogs than are those who do not buy from cable home shopping.

Among respondents who bought at least one item from the cable channel, about a quarter (23%) reported shopping by catalog very often. The comparable number for those who watched but did not buy is 8%.

The converse of this is also true: among those who watch cable home shopping, those who shop catalogs very often are more likely to make purchases from cable channels (32%) than are those who don't shop catalogs very often (11%). That means that the best prospects for cable home shopping are catalog purchasers. (Perhaps some of the purchases made through cable home shopping are at the expense of catalog sales.)

11. What is the sales volume of cable home shopping?

Annual sales might be roughly estimated to be between $695 million and $1,025 million, if the average purchase were to cost $40.

Neither of these studies was designed to estimate total sales. Such an estimate would require figures on the total number of items purchased and the cost per item. Both studies asked if the respondent had purchased. One study asked the number of times the respondent had purchased in the last twelve months. Neither asked respondents about cost per item or the number of items per purchase.

It is possible to estimate the total number of purchases, per year, per person, first for the two samples combined and then, projected, for the total United States. Out of the 2011 respondents in the two samples combined, 104 or 5.2% said they had bought. Sampling error, in this case, is ± .9%.

This proportion could be projected to the 172,957,000 adults 18+ in the United States*; it would be about 22 million purchases on an annual basis (5.2% of the 173 million adults times 2.39 purchases per buyer). If each purchase were to cost $40, as the Media Buying Associates study suggests, then the annual sales volume would be about $860 million, plus or minus $165 million. Taking the $165 million confidence interval into account means that those estimates should be rounded to a low estimate of about $695 million and a high estimate of about $1,025 million.

On the other hand, if total sales volume for the year 1987 were to be about $1.75 billion, as Kagan estimates, then the number of purchases divided into $1.75 billion would provide an estimate of the cost per purchase. The result of those calculations gives an estimate of $81.

---

*MediaMark Research, Inc.; Spring 1987

TABLE 1 NAB Survey

Question: Are there any home shopping programs available in your area that you can watch on your television set?

How often do you watch such TV home shopping programs, at least one or more times every day, about two or three days a week, about two or three times a month, less than once a month or have you never watched at all?

			Frequency of Watching				
	(Base)	Available	2 or more times week	2 or 3 times month	Less	Never	Don't know
Total Public	(1011)	61%	11	16	30	41	*
Northeast	(217)	64%	15	11	31	43	*
North Central	(251)	57%	7	24	28	42	0
South	(343)	63%	13	18	30	39	1
West	(200)	59%	11	11	33	44	0
Non-Metro Area	(281)	57%	16	16	32	37	0
Metro Area (under 1 million)	(354)	64%	9	17	31	43	0
Metro Area (1 million +)	(376)	61%	11	16	29	43	1
Less than 35 years old	(393)	66%	13	19	29	39	0
35-64	(465)	63%	7	15	36	42	0
65 years or more	(144)	45%	19	12	18	48	3
High School Incomplete	(132)	51%	23	11	38	26	3
High School Complete	(384)	62%	14	20	28	38	0
College Incomplete	(204)	66%	7	19	29	45	0
College Graduate	(285)	61%	6	11	33	50	*

TABLE 2 NAB Survey

Question: What kind of merchandise have you seen advertised on such a home shopping program?

What merchandise have you bought from a home shopping program in the past 12 months?

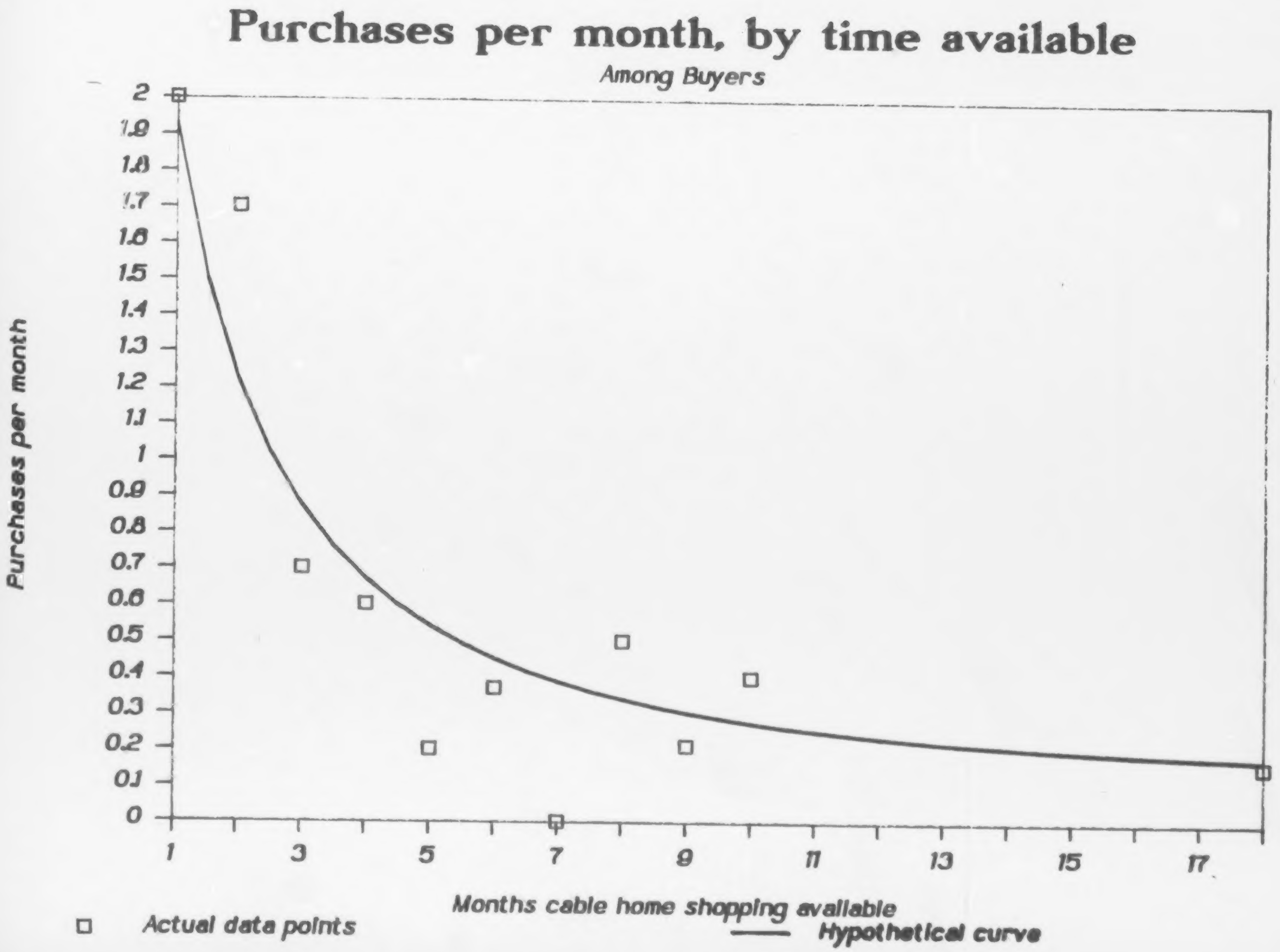
	Advertised			Bought		
Merchandise	All Mentions	Net	Sum	All Mentions	Net	Sum
Personal Apparel		10%	34		2%	11
Furniture/Furnishings		9			1	
Statuettes/figurines	3			1		
Lamps	2			-		
Other	4			-		
Kitchen Utensils		15			8	
Jewelry, etc.		30			24	
Watches	4			5		
Clocks	2			2		
Rings	2			3		
Necklaces	3			1		
Other	19			16		
Electronic/Sound/Video		15			13	
Stereo	4			0		
Radios	5			5		
TV's	4			2		
VCR's	3			2		
Cameras	2			7		
Miscellaneous		21			52	
Tools	5			10		
Toys	4			10		
Car equip.	1			4		
Telephones	2			5		
Other	11			32		
Tools, Toys, Telephones, Watches, Radios & Cameras	22			41		
Base: (mentions)	(888)	100%		(68)	100%	

TABLE 3 NAB Survey

Question: Are there any home shopping programs available in your area that you can watch on your television set? How often do you watch...?

In the past 12 months, how many times have you bought anything advertised on such a program?

	(Base) (Ever Watched)	Purchased in Past 12 Months
Total Public	(357)	13%
Northeast	(80)	11%
North Central	(82)	12%
South	(131)	16%
West	(64)	8%
Non-Metro Area	(98)	16%
Metro Area (under 1 million)	(129)	9%
Metro Area (1 million +)	(130)	14%
Less than 35 years old	(167)	14%
35-64	(160)	11%
65 years or more	(29)	15%
High School Incomplete	(51)	20%
High School Complete	(149)	10%
College Incomplete	(75)	16%
College Graduate	(81)	11%
White	(303)	11%
Black	(38)	27%


Purchases per month, by time available
Among Buyers
Purchases per month
2
1.9
1.8
1.7
1.6
1.5
1.4
1.3
1.2
1.1
1
0.9
0.8
0.7
0.6
0.5
0.4
0.3
0.2
0.1
0
1
3
5
7
9
11
13
15
17
Months cable home shopping available
□ Actual data points
Hypothetical curve

Precision of the Figures in the Samples

Although samples are cheaper and more efficient than censuses in finding out what populations say, samples are not very precise. The imprecision depends both on the sample size and the specifics of the questionnaire.

Because of sample size, in this study a percentage close to 50% will give an estimate that is plus or minus three percentage points. That is, a sample figure of 46% means that the population figure is between 43% and 49%. While 46% is the "best" estimate, there is no way to be certain that the population figure is not 49% or 45%, to take two examples.

For sub-groups of the sample, the estimates are less precise. The worst example is the sub-group of 69 respondents (those who made at least one purchase from cable home shopping) where the estimates for percentages close to 50% are plus or minus twelve percentage points.

The imprecision due to the questionnaire is much more difficult. The value of two waves with similar (but not identical) questionnaires is that separate estimates can be made from each. When those estimates are close, there is reason for confidence that the estimates are close to the population figure.

APPENDIX

The five pages of tables that follow are reproductions of pages from the April 1987 ORC Issue Watch, which is a service of the ORC Public Opinion Index, put out by Opinion Research Corporation, North Harrison St., Princeton, NJ. This issue is devoted to public awareness of TV home shopping programs.

Following the five pages of tables are copies of the questions used in both studies. First there are two pages of questions used in the NAB study. Then come three pages of questions used in the ORC study. Then come six pages of demographic questions that were used with both studies.

"There is a relatively new type of program on television - the home shopping program on which all kinds of merchandise are offered for sale. Viewers make their purchases by phoning in their orders on a toll-free line and paying by either credit card or check."

"How familiar are you with this kind of home shopping program - would you say you are very familiar, fairly familiar, only a little familiar, or not at all familiar?"

	(Base)	Very Familiar	Fairly Familiar	Only a Little Familiar	Not at all Familiar	Don't Know
Total Public	(1001)	15%	22	34	28	1
Northeast	(213)	19%	22	31	28	*
North Central	(250)	13%	22	39	25	2
South	(340)	15%	20	33	31	1
West	(198)	13%	26	35	25	*
Non-Metro Area	(260)	8%	20	37	34	2
Metro Area (under 1 million)	(338)	16%	21	32	30	1
Metro Area (1 million +)	(403)	19%	25	35	21	*
Less than 35 years old	(366)	17%	24	40	18	1
35-64 years	(498)	15%	24	33	27	1
65 years or more	(130)	8%	12	25	54	1
High School Incomplete	(100)	15%	14	26	44	*
High School Graduate	(370)	15%	20	32	31	1
College Incomplete	(189)	15%	26	34	24	1
College Graduate	(330)	15%	25	41	19	*

*Less than 1/2%

"Which home shopping programs do you recall having heard of?"
(Base = Those familiar with home shopping programs)

	Total
(Base)	(725)
Home Shopping Network or Clubs	16%
Cable Value Network	12
Value Television	5
Tel-Shop	2
Shopping Place	1
Quality Value Network	1
Other	7
Don't Know	62

(Multiple Responses Accepted)

"Have you or has anyone else in your household ever watched any home shopping program?"

	Total Public	Total Familiar With Home Shopping Programs
(Base)	(1001)	(725)
Yes, respondent has	41%	54%
Yes, someone else has	11	14
No	51	39
Don't Know	3	1

(Multiple Responses Accepted)

"Have you or has anyone else in your household ever made a purchase from a home shopping program?"
(Base = Those whose household members have watched home shopping programs)

(Base)	Total Public (468)	Total Familiar With Home Shopping Programs (438)
Yes, respondent has	12%	13%
Yes, someone else has	6	6
No	82	82
Don't Know	1	1

(Multiple Responses Accepted)

"Now, I'd like to read you several statements about home shopping programs on TV. As I read each statement, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree."

	(Base)	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know
A. "Home shopping programs are a fad that will not last very long."						
Total Public	(1001)	17%	24	29	15	16
Total Familiar	(725)	16%	26	32	16	10
Total Watched	(468)	16%	24	35	19	6
B. "It is too easy for these programs to exaggerate or distort the description of an item being offered for sale."						
Total Public	(1001)	37%	32	13	7	11
Total Familiar	(725)	38%	34	14	7	6
Total Watched	(468)	40%	32	15	8	5

	(Base)	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know
C. "Home shopping programs are a real convenience for busy people or those who can't get out to shop."						
Total Public	(1001)	30%	41	11	8	9
Total Familiar	(725)	32%	42	13	9	4
Total Watched	(468)	33%	43	11	10	3
D. "If you shop around. you probably can find a lower price for most items than the price on a TV shopping program."						
Total Public	(1001)	36%	28	11	6	19
Total Familiar	(725)	36%	28	13	7	15
Total Watched	(468)	34%	30	15	9	12
E. "Home shopping programs encourage people to buy, on impulse, more than they can afford."						
Total Public	(1001)	42%	28	12	8	10
Total Familiar	(725)	44%	29	13	7	7
Total Watched	(468)	44%	29	14	7	6
F. "Home shopping programs provide enjoyable entertainment for many people even if they buy little or nothing."						
Total Public	(1001)	23%	36	15	14	12
Total Familiar	(725)	26%	39	15	14	6
Total Watched	(468)	31%	42	13	12	3

"All things considered, how do you feel about home shopping programs on TV - do you strongly approve, somewhat approve, somewhat disapprove, strongly disapprove, or doesn't it matter much to you one way or the other?"

(Base)	Total Public (1001)		Total Familiar (725)		Total Watched (468)	
Strongly Approve	7%	31%	8%	35%	10%	41%
Somewhat Approve	24		27		31	
Somewhat Disapprove	8	15	8	15	6	14
Strongly Disapprove	7		7		8	
Doesn't Matter	49		49		45	
Don't Know/No Opinion	4		2		1	

"How often, if at all, have you, personally, shopped by catalog - very often, fairly often, only a little, or never?"

(Base)	Total Public (1001)	
Very Often	12%	79%
Fairly Often	19	
Only a Little	48	
Never	20	
Don't Know/No Opinion	*	

"How often, if at all, has anyone else in your household shopped by catalog - very often, fairly often, only a little, or never?"

(Base)	Total Public (1001)	
Very Often	9%	24%
Fairly Often	15	
Only a Little	38	73
Never	35	
Don't Know/No Opinion	4	

Questions used in the NAB study.

There is a relatively new type of program on television - the home shopping program on which all kinds of merchandise are offered for sale. Viewers make their purchases by phoning in their orders on a toll-free line and paying by either credit card or check.

N1. Are there any home shopping programs available in your area that you can watch on your television set?

1 YES
2 NO ——▶ SKIP TO NEXT SECTION
3 DON'T KNOW ——▶ SKIP TO NEXT SECTION

IF "1" IN Q. N1, ASK:

N2. For how many months would you say such TV home shopping programs have been available to you? (CIRCLE ONE RESPONSE.)

1 ONE MONTH
2 TWO MONTHS
3 THREE MONTHS
4 FOUR MONTHS
5 FIVE MONTHS
6 SIX MONTHS
7 SEVEN MONTHS
8 EIGHT MONTHS
9 NINE MONTHS
10 TEN MONTHS
11 ELEVEN MONTHS
12 TWELVE MONTHS OR LONGER
13 DON'T KNOW

N3. How often do you watch such TV home shopping programs, at least one or more times every day, about two or three days a week, about two or three times a month, less than once a month, or have you never watched at all?

1 ONE OR MORE TIMES EVERY DAY
2 TWO OR THREE TIMES A WEEK
3 TWO OR THREE TIMES A MONTH
4 LESS THAN ONCE A MONTH
5 NEVER WATCHED AT ALL ——▶ SKIP TO NEXT SECTION
6 DON'T KNOW

IF NOT "5" IN Q. N3, ASK:

N4. What kind of merchandise have you seen advertised on such a home shopping program? Please try to recall as many items as you can. (PROBE: What else?)

CONTINUE IF NOT "5" IN Q.N3:

N5. In the past 12 months, how many times have you bought anything advertized on such a program?

1 NONE → SKIP TO NEXT SECTION
2 ONCE
3 TWICE
4 3 TIMES
5 4 TIMES
6 5 TIMES
7 6 TIMES
8 7 TIMES
9 8 TIMES
10 9 TIMES
11 10 TIMES OR MORE
12 DON'T KNOW

IF NOT "1" IN Q. N5, ASK:

N6. What merchandise have you bought from a home shopping program in the past 12 months? (PROBE: What else?)

Questions used in the ORC study.

SECTION H

There is a relatively new type of program on television - the home shopping program on which all kinds of merchandise are offered for sale. Viewers make their purchases by phoning in their orders on a toll-free line and paying by either credit card or check.

H1. How familiar are you with this kind of home shopping program - would you say you are very familiar, fairly familiar, only a little familiar, or not at all familiar?

1 VERY FAMILIAR
2 FAIRLY FAMILIAR
3 ONLY A LITTLE FAMILIAR
4 NOT AT ALL FAMILIAR
5 DON'T KNOW/NO OPINION → SKIP TO Q.3

IF "1," "2," OR "3" ON Q.1, ASK:

H2. Which home shopping programs do you recall having heard of? (ASK AS AN OPEN QUESTION. DO NOT READ RESPONSES. CIRCLE ALL RESPONSES GIVEN. WRITE IN "OTHER" RESPONSES.)

1 CABLE VALUE NETWORK
2 HOME SHOPPING NETWORK OR CLUBS
3 SHOPPING PLACE
4 TEL-SHOP
5 QUALITY VALUE NETWORK
6 VALUE TELEVISION
7 OTHER (SPECIFY): ____________________
8 DON'T KNOW/NO OPINION

H3. Have you or has anyone else in your household ever watched any home shopping program? (ACCEPT MULTIPLE RESPONSES.)

1 YES, RESPONDENT HAS
2 YES, SOMEONE ELSE HAS
3 NO
4 DON'T KNOW/NO OPINION → SKIP TO Q.5

IF "1" AND/OR "2" ON Q.3, ASK:

H4. Have you or has anyone else in your household ever made a purchase from a home shopping program? (ACCEPT MULTIPLE RESPONSES.)

1 YES, RESPONDENT HAS
2 YES, SOMEONE ELSE HAS
3 NO
4 DON'T KNOW/NO OPINION

H5. Now, I'd like to read you several statements about home shopping programs on TV. As I read each statement, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. (START FIRST INTERVIEW WITH "a", SECOND INTERVIEW WITH "c", THIRD INTERVIEW WITH "e." REPEAT SEQUENCE ON SUBSEQUENT INTERVIEWS. ASK ALL ITEMS ON EVERY INTERVIEW.)

	STRONGLY AGREE	SOMEWHAT AGREE	SOMEWHAT DISAGREE	STRONGLY DISAGREE	DON'T KNOW/ NO OPINION
→ a. Home shopping programs are a fad that will not last very long	1	2	3	4	5
b. It is too easy for these programs to exaggerate or distort the description of an item being offered for sale	1	2	3	4	5
→ c. Home shopping programs are a real convenience for busy people or those who can't get out to shop	1	2	3	4	5
d. If you shop around, you probably can find a lower price for most items than the price on a TV shopping program	1	2	3	4	5
→ e. Home shopping programs encourage people to buy, on impulse, more than they can afford	1	2	3	4	5
f. Home shopping programs provide enjoyable entertainment for many people even if they buy little or nothing	1	2	3	4	5

H6. All things considered, how do you feel about home shopping programs on TV - do you strongly approve, somewhat approve, somewhat disapprove, strongly disapprove, or doesn't it matter much to you one way or the other?

1	STRONGLY APPROVE
2	SOMEWHAT APPROVE
3	SOMEWHAT DISAPPROVE
4	STRONGLY DISAPPROVE
5	DOESN'T MATTER
6	DON'T KNOW/NO OPINION

H7. How often, if at all, have you, personally, shopped by catalog - very often, fairly often, only a little, or never?

1 VERY OFTEN

2 FAIRLY OFTEN

3 ONLY A LITTLE

4 NEVER

5 DON'T KNOW/NO OPINION

H8. How often, if at all, has anyone else in your household shopped by catalog - very often, fairly often, only a little, or never?

1 VERY OFTEN

2 FAIRLY OFTEN

3 ONLY A LITTLE

4 NEVER

5 DON'T KNOW/NO OPINION

Demographic questions used in both studies.

SECTION S

Now, just a few questions for background purposes.

S1. Are you the male/female head of this household?

1 YES
2 NO
3 REFUSED

S1a. Are you currently . . . ?

1 Employed full time
2 Employed part time
3 Retired
4 Not employed

3, 4 → SKIP TO Q.S3

IF "1" OR "2" ON Q.S1a, ASK:

S2. What is your occupation? (REFER TO OCCUPATION CODE.)

1 WHITE COLLAR -- PROFESSIONAL, MANAGERIAL, OWNER
2 WHITE COLLAR -- SALES, CLERICAL
3 BLUE COLLAR -- CRAFTSMEN/FOREMEN
4 BLUE COLLAR -- SEMISKILLED, UNSKILLED
5 SERVICE WORKER
6 OTHER (SPECIFY):________________

S3. What is your current marital status? Are you . . . ?

1 Married
2 Living as married
3 Single and never been married
4 Divorced
5 Separated
6 Widowed

S3a. Do you own or rent the dwelling in which you live?

1 OWN
2 RENT

4. **Altogether, including you and any others, how many people regularly live in this household?**

1 ONE → SKIP TO Q.S7
2 TWO
3 THREE
4 FOUR
5 FIVE
6 SIX
7 SEVEN
8 EIGHT
9 NINE
10 TEN OR MORE

IF MORE THAN ONE PERSON ON Q.S4, ASK:

S5. Are there any children living in your household under 12 years of age?

1 YES
2 NO
3 DON'T KNOW

S6. Are there any children living in your household aged 12 through 17?

1 YES
2 NO
3 DON'T KNOW

S7. What was the last grade in school you completed?

1 8TH GRADE OR LESS
2 HIGH SCHOOL INCOMPLETE (GRADES 9, 10, 11)
3 HIGH SCHOOL COMPLETE (GRADE 12)
4 SOME COLLEGE
5 COLLEGE GRADUATE
6 POSTGRADUATE WORK
7 PROFESSIONAL/TECHNICAL SCHOOL
8 REFUSED

S8. What is your age?

1 18-20
2 21-24
3 25-29
4 30-34
5 35-39
6 40-44
7 45-49
8 50-54
9 55-59
10 60-64
11 65 OR OLDER
12 REFUSED

S9. Are you white, black, or some other race?

1 WHITE
2 BLACK
3 OTHER
4 REFUSED

S10. Was your total household income before taxes for 1986 less than $25,000 or $25,000 or more?

1 LESS THAN $25,000 ——→ Was that . . . ? (READ CHOICES.)

  1 Under $7,000
  2 $7,000 but less than $10,000
  3 $10,000 but less than $15,000
  4 $15,000 but less than $20,000
  5 $20,000 but less than $25,000

2 $25,000 OR MORE ——→ Was that . . . ? (READ CHOICES.)

  6 $25,000 but less than $30,000
  7 $30,000 but less than $35,000
  8 $35,000 but less than $50,000
  9 $50,000 or more

3 DON'T KNOW/REFUSED

Thank you very much for your time. May I please verify that I reached you by dialing . . .

______________ (AREA CODE)   ____________________ (TELEPHONE NUMBER)

A8600-8.43 U 12/87

DAILY NEWSPAPERS '87

Taking Stock Of A Changing Medium

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921-5080

DAILY NEWSPAPERS '87

Taking Stock of
a Changing Medium

October 1987

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CONTENTS

Page

LIST OF TABLES.. v

INTRODUCTION.. vii

FINDINGS:

Changing Content of the Dynamic American Newspaper.......... 1

The Newspaper's Look Is Also Changing........................ 4

Standing Features in Today's American Newspaper............. 7

Everyday Features and Columns................................ 12

Almost All Carry Comic Strips................................ 14

How Many Sections Do Weekday Editions Have?.................. 15

The Continuing Sectional Revolution.......................... 17

Positioning Requests... 21

ROP Color.. 22

Zoning... 24

Split Run Capabilities....................................... 26

Home Delivery.. 28

LIST OF TABLES

Page

1. Changes in Editorial Content since April 1983

a. by Total Newspapers and Circulation.................. 2
b. by Circulation Size Groups........................... 3

2. Changes in Graphics or Layout Since April 1983

a. by Total Newspapers and Circulation.................. 5
b. by Circulation Size Groups........................... 6

3. Percentage of Newspapers Carrying Listed Features Once a Week or More Often

a. by Total Newspapers and Circulation.................. 8- 9
b. by Circulation Size Groups........................... 10-11

4. Features or Columns Carried Every Weekday by 10% or More of Newspapers 13

5. Number of Comic Features in Weekday Editions (by Circulation Size Groups)............................ 14

6. Number of Physically Separate Sections in Weekday Editions

a. by Total Newspapers and Circulation.................. 15
b. by Circulation Size Groups........................... 16

7. Sections Carried Once a Week or More Often

a. by Total Newspapers and Circulation.................. 18
b. by Circulation Size Groups........................... 19

8. Weekdays on Which Editorial Sections Appear.................. 20

9. Percentage of Newspapers That Accommodate Positioning Requests 21

10. Percent of Newspapers Offering ROP Color

a. by Total Newspapers and Circulation.................. 22
b. by Circulation Size Groups........................... 23

11. Zoning of Weekday Editions................................ 25

12. Split Run Capabilities Offered............................ 27

13. Percentage of Weekday Circulation Home Delivered

a. by Total Newspapers and Circulation.................. 28
b. by Circulation Size Groups........................... 29

INTRODUCTION

The findings presented here are based on the Newspaper Advertising Bureau's 1987 Newspaper Inventory Survey. This mail survey of every daily and Sunday/weekend newspaper in the United States and Canada is an expanded update of earlier inventories conducted in 1967, 1974, 1979 and 1983.

The main purpose of the earlier surveys was to identify individual newspapers carrying specific standing features or columns for the use of advertisers and agencies who wish to position advertising near particular kinds of feature content. However, later surveys were expanded to include questions on changes in content, graphics and layout; positioning practices; the proportion of circulation that is home delivered; etc.

Across the five surveys some changes have been made in order to take into account the dynamic character of reader interest and corresponding changes in the newspaper itself. Categories like "personal computers," "videotape reviews" and "wine" have been added; a few, like "chess" have been dropped. In all, the 1987 weekday inventory includes twelve kinds of sections and fifty-eight kinds of features or columns.

The findings presented in this report refer only to local, English language weekday editions published in the United States. (A companion volume summarizes findings for Sunday and weekend editions.) The summary tables shown are based on completed questionnaires from 987 daily newspapers representing 59% of all United States dailies and 79% of total circulation. Results have been weighted by circulation size groups, in order to project them to the total number of daily newspapers, as well as to total newspapers in circulation.

		Total U.S. Weekday:	
Circulation Group:	Sample	Newspapers	Circulation
100,000 & over	11%	7%	49%
50,000 - 99,999	10	8	16
25,000 - 49,999	18	16	15
10,000 - 24,999	30	30	13
Under 10,000	31	39	7
Bases:	(987)	(1670)	(59,510,575)

The study was directed by Charles Lehman of NAB's Research Department, and the report was updated by Dorothy Shea.

A computerized list of the weekday and Sunday editions carrying a particular section or feature is available on request. For information, telephone Dorothy Shea at (212) 704-4557.

FINDINGS

Changing Content of the Dynamic American Newspaper

Findings from the 1987 Newspaper Inventory show that the period of rapid change in content, previously noted in the 1979 and 1983 inventories, continues unabated. Since 1983, nearly seven out of ten newspapers (69%) report substantial changes in content. These changes affect over eight out of ten (82%) of the weekday copies in circulation, because innovation is most widespread among the largest newspapers with the biggest newsholes (Tables 1a, 1b).

As in 1983, the three most frequently reported changes are: increased business coverage (by 53% of all newspapers), increased sports coverage (by 45%) and increased ratio of state and local to national and international coverage (by 35%). Very few newspapers reported a decrease in business coverage (1%) or sports coverage (1%). (Not shown in table.)

A shift toward more local and state coverage relative to national and international coverage is roughly four times as common as a shift in the opposite direction. Along the same lines, 18% of the responding newspapers report an increased emphasis on features, as compared with 10% reporting an increased emphasis on hard news.

Zoning for better neighborhood or suburban coverage is reported by 13% of all dailies, accounting for 36% of total circulation.

Table 1a

Changes in Editorial Content Since April 1983

	Newspapers*	Weighted by Circulation**
Made Substantial Changes	69%	82%
Increased business coverage	53	70
Increased sports coverage	45	55
Increased ratio of local, state to national, international coverage	35	30
Added special lifestyle sections	24	36
Increased ratio of features to hard news	18	18
Zoned for (more) neighborhood, suburban coverage	13	36
Increased ratio of hard news to features	10	12
Increased ratio of national, international to local, state coverage	8	9
Other	8	15
Made no changes, not reported	31	18

Question: Since our last survey in April 1983, has your paper made any substantial changes in editorial content? (If "Yes") Please check the areas changed.

* Weighting based on distribution of 1,671 daily newspapers among five circulation size groups.

**Weighting based on distribution of 59,510,575 circulation among five circulation size groups.

Table 1b

Changes in Editorial Content Since April 1983
(by Circulation)

	100,000 & Over	50,000- 99,999	25,000- 49,999	10,000- 24,999	Under 10,000
Made substantial changes	89%	86%	81%	68%	57%
Increased business coverage	76	80	71	54	35
Increased sports coverage	59	57	54	44	38
Increased ratio of local, state to national, international coverage	25	28	42	37	32
Added special lifestyle sections	43	37	36	22	14
Increased ratio of features to hard news	16	20	22	19	15
Zoned for (more) neighborhood, suburban coverage	56	32	16	10	2
Increased ratio of hard news to features	13	8	15	10	8
Increased ratio of national, international to local, state coverge	10	12	8	7	4
Other	22	11	7	10	4
Made no changes, not reported	11	14	19	32	43
Base: Newspapers responding = 100%	(108)	(103)	(177)	(291)	(308)

Question: Since our last survey in April 1983, has your paper made any substantial changes in editorial content? (If "Yes") Please check the areas changed.

The Newspaper's Look Is Also Changing

Reported changes in graphics or layout are even more frequent than changes in content. Since 1983, eight out of ten newspapers (82%) representing 91% of total circulation, report substantial changes in graphics or layout. In every one of the five circulation size groups, from "100,000 and over" to "under 10,000," more than seven out of ten dailies report changes of this kind (Tables 2a, 2b).

The aspects of graphics and layout most widely affected are: increased use of ROP color, reported by 61% of all newspapers (75% of total circulation), and adoption of SAU™ and column specs (60% of newspapers, 65% of circulation). The latter change is often made to conform to the expanded SAU™ Newspaper Advertising Standards, endorsed by the Board of Directors of ANPA and NAB.

There has also been a substantial increase in use of computer graphics. In the 1987 study, 28% of responding dailies (52% of circulation) reported more use of graphics compared to 2% in 1983 (3% of circulation).

Table 2a

Changes in Graphics or Layout Since April 1983

	Newspapers*	Weighted by Circulation**
Made Substantial Changes	82%	91%
More use of ROP color	61	75
Changed to SAU page and column specs	60	65
Changed masthead	43	48
Changed typeface	37	40
Increased use of photographs	36	38
Increased use of computer graphics	28	52
Went to modular layout on front page	22	23
Other	11	14
Made no changes, not reported	18	9

Question: Since our last survey in April 1983, has your paper made any substantial changes in graphics or layout? (If "Yes") Please check the areas changed.

* Weighting based on distribution of 1,671 daily newspapers among five circulation size groups.

**Weighting based on distribution of 59,510,575 circulation among five circulation size groups.

Table 2b

Changes in Graphics or Layout Since April 1983
(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Made substantial changes	95%	91%	92%	81%	73%
More use of ROP color	81	78	73	63	47
Increased use of computer graphics	70	50	36	23	16
Changed to SAU page and column specs	67	65	68	60	55
Changed masthead	49	43	54	46	36
Changed typeface	42	37	49	33	36
Increased use of photographs	35	44	44	35	32
Went to modular layout on front page	22	28	23	23	21
Other	15	16	15	9	8
Made no changes, not reported	5	9	8	19	27
Base: Newspapers responding = 100%	(108)	(103)	(177)	(291)	(308)

Question: Since our last survey in April 1983, has your paper made any substantial changes in graphics or layout? (If "Yes") Please check the areas changed.

Standing Features in Today's American Newspaper

The tremendous variety of features in today's newspaper is easily documented: In all, the newspapers responding to this survey were asked about fifty-eight categories of content; at least once a week, fifteen of these features appear in the majority of United States dailies, while thirty-two features are carried by 25% or more (Table 3a).

Large-circulation newspapers with bigger newsholes tend to carry more standing features than smaller newspapers. This means that twenty-four features are carried at least once a week in the majority of all copies in circulation, and that forty-one kinds of features are carried in 25% or more of total circulation (Tables 3a, 3b).

The eighteen most widely run features appear in at least 70% of total weekday circulation: crossword puzzles (98%); spectator sports (94%); astrology (92%); TV log (92%); business, finance (89%); weather map (89%); recipes (88%); personal advice (83%); participant sports (81%); bridge (80%); Op Ed page (78%); security & commodity quotations (76%); movie reviews (74%); TV reviews (71%); health and medical (70%), best food buys (70%); social news (70%); and "people" (70%).

At least two kinds of features are more widely carried by smaller newspapers: "farm and ranch" features, which appear in 45% of the smallest dailies (circulation under 10,000) but only 13% of the largest; and "religion," in 68% of the smallest and 17% of the largest (Table 3b).

Table 3a

Percentage of Newspapers Carrying Listed Features or Columns Once a Week or More Often

	Newspapers*	Weighted by Circulation**
Advice on personal finance	37%	60%
Astrology	85	92
Automotive	16	28
Beauty	15	23
Best food buys	55	70
Books	26	28
Bridge	57	80
Business, financial	69	89
Career advice	10	26
Child care	10	19
College	8	6
Computers, personal	9	26
Consumers, "Action Line"	18	35
Crossword Puzzle	95	98
Diet, nutrition	43	65
Environment, ecology	7	11
Etiquette	16	31
Farm and ranch	34	20
Fashion, men	15	27
Fashion, women	23	37
Fashion, teenage	14	24
Gardening	30	35
Health and medical	55	70
Home building, repair	16	21
Home furnishings, decorating	17	24
Household hints	35	38
Movie reviews	49	74
Movie timetable	49	67
Music, records, tapes, CDs	33	52
Op Ed page	58	78
Outdoors: camping, fishing, etc.	39	59
"People"	47	70

Table 3a (continued)

Percentage of Newspapers Carrying
Listed Features or Columns Once a Week or More Often

	Newspapers*	Weighted by Circulation**
Personal advice	68%	83%
Pets	14	15
Photography	4	5
Physical fitness	13	26
Radio log	13	32
Real estate (other than ads)	15	22
Recipes	71	88
Religion	49	27
Restaurants	34	62
Retirement, senior citizens	23	27
School news (grade, high)	55	44
Science, technology	11	26
Security & commodity quotations	46	76
Sewing patterns	31	37
Social news	77	70
Sports (spectator)	89	94
Sports (participant)	81	81
Stamps, coins	3	6
TV reviews	47	71
TV log	83	92
Theater	44	65
Travel & resort	8	12
Videotape reviews	15	29
Weather map	67	89
Wine	14	42
Youth	19	22

Question: How often do you carry the following standing features or columns on weekdays?

* Weighting based on distribution of 1,671 daily newspapers among five circulation size groups.

**Weighting based on distribution of 59,510,575 circulation among five circulation size groups.

Table 3b

Percentage of Newspapers Carrying Listed Features or Columns Once A Week or More Often

(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Advice on personal finance	75%	68%	41%	36%	21%
Astrology	94	97	92	89	75
Automotive	39	25	16	13	12
Beauty	30	22	18	12	12
Best food buys	81	68	62	53	45
Books	31	21	26	27	25
Bridge	90	82	83	62	33
Business, financial	98	95	88	70	50
Career advice	42	20	12	6	5
Child care	22	28	15	6	6
College	5	5	6	8	10
Computers, personal	43	17	15	5	2
Consumers, "Action Line"	49	35	23	13	10
Crossword puzzle	98	98	98	97	92
Diet, nutrition	79	65	59	37	30
Environment, ecology	14	16	7	4	6
Etiquette	42	35	22	13	7
Farm and ranch	13	18	23	34	45
Fashion, men	38	22	19	11	10
Fashion, women	48	33	30	19	16
Fashion, teenage	32	17	21	11	10
Gardening	34	40	39	32	22
Health and medical	81	71	64	47	50
Home building, repair	22	26	19	18	12
Home furnishings, decorating	26	28	26	14	11
Household hints	40	40	34	36	33
Movie reviews	88	83	66	46	30
Movie timetable	78	70	59	46	36
Music, records, tapes, CDs	66	51	44	31	19
Op Ed page	93	82	63	53	49
Outdoors: camping, fishing, etc.	73	59	46	40	25
"People"	89	69	53	41	37

Table 3b (continued)

Percentage of Newspapers Carrying Listed Features or Columns Once A Week or More Often

(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Personal advice	92%	87%	76%	67%	58%
Pets	14	20	14	14	14
Photography	6	5	3	5	4
Physical fitness	35	29	20	7	8
Radio log	48	24	18	9	5
Real estate (other than ads)	31	14	12	15	14
Recipes	95	92	86	73	56
Religion	17	25	26	50	68
Restaurants	84	58	42	29	21
Retirement, senior citizens	30	26	28	21	21
School news (grade, high)	36	45	51	57	61
Science, techology	39	18	18	6	6
Security & commodity quotations	95	78	62	45	25
Sewing patterns	36	39	50	37	17
Social news	66	66	72	78	81
Sports (spectator)	96	95	95	88	85
Sports (participant)	81	83	84	81	78
Stamps, coins	8	7	5	3	1
TV reviews	91	62	62	42	33
TV log	95	96	92	79	77
Theater	77	62	62	44	28
Travel & resort	15	10	12	10	4
Videotape reviews	39	28	24	12	7
Weather map	97	92	90	80	36
Wine	65	34	21	8	4
Youth	21	25	27	19	15
Base: Newspapers responding = 100%	(108)	(103)	(177)	(291)	(308)

Question: How often do you carry the following editorial features or columns on weekdays?

Everyday Features and Columns

Most standing features or columns appear only on particular weekdays, not in every daily edition. However, certain types of features tend to appear every day in the great majority of newspapers carrying them. These are: astrology, bridge, crossword puzzles, personal advice, social news, spectator sports, participant sports, TV log and weather map (See Table 4).

Table 4

Features or Columns Carried Every Weekday by 10% or More of Newspapers

	Newspapers
Advice on personal finance	13%
Astrology	83
Bridge	54
Business, financial	42
Crossword puzzle	93
Health and medical	31
Household hints	22
Movie reviews	12
Movie timetable	34
Op Ed page	48
"People"	39
Personal advice	66
School news (grade, high)	25
Security & commodity quotations	40
Sewing patterns	26
Social news	62
Sports (spectator)	87
Sports (participant)	75
TV reviews	29
TV log	66
Theater	19
Weather map	66

Almost All Carry Comic Strips

Ninety-five percent of all responding newspapers report that they carry comic strips, and this proportion shows little variation among circulation size groups. As might be expected, the number of strips carried tends to increase with circulation size, but a majority of all dailies carry ten to nineteen individual comic strips.

Table 5
Number of Comic Features in Weekday Editions
(by Circulation)

	Weighted Total*	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Any comic strips (total)	95%	94%	96%	94%	96%	95%
Less than 10 strips	27	1	5	8	21	49
10-19 strips	56	27	54	66	71	45
20-29 strips	11	45	37	19	4	1
30 strips or more	2	21	-	1	0	-
No comic strips	1	2	-	-	0	2
Not reported	4	4	4	6	4	3
Base: Newspapers responding = 100%		(108)	(103)	(177)	(291)	(308)

Question: How many comic strips are carried in weekly editions?

*Weighting based on distribution of 1,671 daily newspapers among five circulation size groups.

How Many Sections Do Weekday Editions Have?

Weekday editions of a typical daily contain three physically separate sections. On the average, newspapers in the largest circulation size group have two and one half times as many sections as the smallest dailies have (five versus two sections). As a result, the average weekday edition in circulation has four sections (Tables 6a, 6b). The range within individual circulation size groups is greater than these average figures might suggest.

Table 6a

Number of Physically Separate Sections in Weekday Editions

	Newspapers*	Weighted by Circulation**
One	17%	5%
Two	32	13
Three	11	11
Four	25	41
Five	2	6
Six	3	14
Seven or More	2	7
Not reported	8	4
Average number (mean)	(3)	(4)

Question: On the average, how many physically separate sections does a weekday edition of the newspaper have? (Please include any separate classified sections but exclude advertising inserts or preprints.)

* Weighting based on distribution of 1,671 daily newspapers among five circulation size groups.

**Weighting based on distribution of 59,510,575 circulation among five circulation size groups.

Table 6b

Number of Physically Separate Sections in Weekday Editions
(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
One	2%	-	3%	6%	38%
Two	1	6	14	49	37
Three	9	13	15	15	7
Four	39	61	59	22	2
Five	9	3	3	1	1
Six	25	5	2	1	2
Seven or more	12	7	1	0	1
Not reported	3	6	3	5	13
Average number (mean)	(5)	(4)	(4)	(3)	(2)
Base: Newspapers responding = 100%	(108)	(103)	(177)	(291)	(308)

Question: On the average, how many physically separate sections does a weekday edition of the newspaper have? (Please include any separate classified sections but exclude advertising inserts or preprints.)

The Continuing Sectional Revolution

The term "section," as it applies to newspapers, can be ambiguous, referring either to a physically separate part, the grouping of related content on adjacent pages, or to both form and content simultaneously. Thus, a single (physically separate) section may contain two or more "sections" (as defined by content). The 1979 Inventory asked only about "physically separate" sections, whereas the 1983 and 1987 surveys also included a reference to "labeled or otherwise identifiable" sections.

As might be expected, this revision in the questionnaire produced an increase in the number of newspapers reporting the presence of a given type of section. For example, the percentage reporting a business or finance section at least once a week rose from 15% of all newspapers in 1979, to 43% in 1983 (representing 62% of all copies in circulation) and 57% in 1987 (82% of circulation). This information is presented in Tables 7a and 7b.

As in the case of standing features, almost all kinds of sections are more likely to appear in big circulation dailies than in smaller newspapers. One notable exception is the TV and radio section. This kind of section tends to appear in the Sunday edition of large newspapers, whereas smaller newspapers that don't have a Sunday or weekend edition may carry it in a weekday edition.

Table 7a

Sections Carried Once A Week or More Often

	Newspapers*	Weighted by Circulation**
Main News	85%	95%
Second or Local News	49	68
Sports	84	93
Food (separate)	61	83
Home (separate)	12	15
Food & Home (combined)	7	3
Entertainment	63	79
Business, Finance	57	82
Lifestyle, Women	58	71
TV Section	42	25
Fashion	19	31
Science	7	17
Travel	5	6

Question: Which of the following regularly appear as physically separate, labeled or otherwise identifiable sections in weekday editions (that is, at least once a week)?

* Weighting based on distribution of 1,671 daily newspapers among five circulation size groups.

**Weighting based on distribution of 59,510,575 circulation among five circulation size groups.

Table 7b

Sections Carried Once A Week or more Often
(by Circulation)

	100,000 & Over	50,000- 99,999	25,000- 49,999	10,000- 24,999	Under 10,000
Main News	99%	98%	95%	89%	73%
Second or Local News	79	71	65	48	33
Sports	96	97	93	91	69
Food (separate)	94	91	79	64	40
Home (separate)	17	15	18	12	8
Food & Home (combined)	1	3	5	7	10
Entertainment	87	83	75	66	48
Business, Finance	97	87	70	57	39
Lifestyle, Women	75	83	66	63	42
TV Section	15	27	27	44	56
Fashion	41	24	25	18	11
Science	28	9	12	4	3
Travel	5	7	8	4	4
Base: Newspapers responding = 100%	(108)	(103)	(177)	(291)	(308)

Question: Which of the following regularly appear as physically separate, labeled or otherwise identifiable sections in weekday editions (that is, at least once a week)?

Table 8 shows that among newspapers carrying several pages or a section on a given topic, there is a tendency to include that kind of material in every weekday edition. However, most food sections are published only on Wednesday, and Friday is a popular day for both entertainment and TV, radio sections.

Table 8

Weekdays on Which Editorial Sections Appear*
(Total U.S. Daily Newspapers)**

	Every-day	Monday	Tuesday	Wednesday	Thursday	Friday
Main News	84%	1%	1%	1%	1%	1%
Second or Local News	44	0	2	3	2	1
Sports	80	2	1	3	2	2
Food (separate)	2	4	7	43	7	1
Home (separate)	2	1	1	2	4	3
Food & Home (combined)	2	0	1	4	1	0
Entertainment	34	1	1	2	12	18
Business, Finance	31	6	9	10	8	5
Lifestyle, Women	43	3	4	8	7	4
TV, Radio	14	1	1	1	4	22
Fashion	5	1	3	5	5	2
Science	1	1	2	1	1	0
Travel	1	0	1	1	1	1

* Because some newspapers report carrying a section on two or more weekdays, rows may add to more than the totals shown in Table 7a.

**Weighting based on distribution of 1,671 daily newspapers among five circulation size groups.

Positioning Requests

The majority of dailies who carry specific sections once a week or more frequently will try to accommodate positioning requests for those sections, as Table 9 shows. For a complete breakdown of newspapers that accommodate positioning requests, refer to alphabetized Newspaper Inventory listings available on request by section or feature type.

Table 9

Percentage of Newspapers That Accommodate Positioning Requests

	Carry Once a Week or More Often		Of those...
	Newspapers	Weighted by Circulation	Percentage Who Accommodate Requests
Main News	85%	95%	63%
Second or Local News	49	68	57
Sports	84	93	61
TV Section	42	25	71
Lifestyle, Women	58	71	63
Business, Finance	57	82	68
Entertainment	63	79	69
Food	61	83	65
Home	12	15	76
Food & Home	7	3	63
Fashion	19	31	68
Science	7	17	59
Travel	5	6	88

ROP Color

Nearly all newspapers offer some form of ROP color. Eighty-six percent (representing 92% of total circulation) offer full color at least once a week; ninety-six percent (96% of circulation) provide spot color as frequently. In most cases, ROP color is available every day.

Table 10a

Percent of Newspapers Offering ROP Color

	Newspapers*	Weighted by Circulation**
Full Color		
At Least Once a Week	86%	92%
Daily	82	88
Spot Color		
At Least Once a Week	96	96
Daily	94	95

Question: On what weekdays do you offer ROP color availability to advertisers?

* Weighting based on distribution of 1,671 daily newspapers among five circulation size groups.

**Weighting based on distribution of 59,510,575 circulation among five circulation size groups.

Table 10b

Percent of Newspapers Offering ROP Color
(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Full Color					
At least once a week	93%	93%	96%	91%	75%
Daily	88	89	94	88	70
Spot Color					
At least once a week	95	94	98	97	95
Daily	94	94	98	96	92
Base: Newspapers responding = 100%	(108)	(103)	(177)	(291)	(308)

Question: On what weekdays do you offer ROP color availability to advertisers?

Zoning

Zoning, reported by 30% of all daily newspapers representing 59% of total circulation, is far more widespread among the largest dailies (Table 11). Just over two thirds (69%) of the newspapers with circulation of 100,000 or more have zoned editions, as do 56% of those with circulations between 50,000 and 100,000. Among these larger dailies, zoning usually applies to both editorial content and advertising.

Table 11

Zoning of Weekday Editions

	Newspapers*	Weighted By: Circulation **
Zoning for advertising and editorial	19%	49%
Zoning for advertising only	11	10
No zoning	64	37
Not reported	7	4

(by Circulation Size Groups)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Advertising and editorial	69%	56%	33%	9%	5%
Advertising only	10	5	11	14	9
No zoning	20	35	49	69	79
Not reported	1	4	6	8	8
Base: Newspapers responding = 100%	(108)	(103)	(177)	(291)	(308)

Question: To what extent are weekday editions zoned?

* Weighting based on disribution of 1,671 daily newspapers among five circulation size groups.

**Weighting based on distribution of 59,510,575 circulation among five circulation size groups.

Split Run Capabilities

A/B split run capabilities are available from 25% of all dailies (accounting for 52% of total circulation). As would be expected, larger dailies (50,000+ circulation) are much more likely to offer this service.

Controlled split run capabilities are not widely offered by the dailies, regardless of size. Only 12% (15% circulation) report availability of this service.

Table 12

Split Run Capabilities Offered

	Total Responses Newspapers*	Weighted By: Circulation **
Controlled	12%	15%
A/B	25	52

(by Circulation Size Groups)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Controlled	17%	15%	14%	11%	9%
A/B	70	58	37	20	8
Base: Newspapers responding = 100%	(108)	(103)	(177)	(291)	(308)

Question: What split run capabilities do you offer to advertisers for testing purposes?

* Weighting based on disribution of 1,671 daily newspapers among five circulation size groups.

**Weighting based on distribution of 59,510,575 circulation among five circulation size groups.

Home Delivery

Responding newspapers estimate that 85% (median) of their circulation is home delivered. Table 13a indicates that the median percentage for all copies in circulation is 83%, but this is an overstatement. The reason is that the median of 81% for newspapers of 100,000 and over (shown in Table 13b) does not break out newspapers with circulations of 250,000 or more. Single-copy sales are more important for these very large dailies, which represent only 32% of the newspapers with more than 100,000 circulation[1] but account for 63% of total circulation in this size group.

Table 13a

Percentage of Weekday Circulation Home Delivered

	Newspapers*	Weighted By: Circulation **
Under 60%	8%	7%
60% to 69%	8	8
70% to 79%	13	18
80% to 89%	30	36
90% and over	30	18
Not reported	11	13
Median percentage	(85%)	(83%)

Question: Approximately what percentage of your current weekday circulation is home delivered?

* Weighting based on distribution of 1,671 daily newspapers among five circulation size groups.

**Weighting based on distribution of 59,510,575 circulation among five circulation size groups.

---

[1] Response Analysis Corporation, 1986.

Table 13b

Percentage of Weekday Circulation Home Delivered
(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Under 60%	7%	8%	6%	4%	11%
60% to 69%	7	13	7	7	9
70% to 79%	26	7	12	14	13
80% to 89%	38	39	36	30	25
90% and over	7	17	29	35	33
Not reported	14	17	11	11	9
Median percentage	(81%)	(84%)	(86%)	(87%)	(85%)
Base: Newspapers reporting = 100%	(108)	(103)	(177)	(291)	(308)

Question: Approximately what percentage of your current weekday circulation is home delivered?

A8600-8.44U

12/87

SUNDAY/WEEKEND EDITIONS '87

Taking Stock Of A Changing Medium

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921-5080

SUNDAY/WEEKEND EDITIONS '87

Taking Stock of
a Changing Medium

October 1987

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CONTENTS

Page

LIST OF TABLES.. v

INTRODUCTION.. vii

FINDINGS:

Sections in Sunday and Weekend Newspapers................. 1

Magazine Supplements and Comic Sections.................. 7

Editorial Content of Sunday/weekend Newspapers........... 10

How Do Standing Features in Sunday and Weekday Editions Compare?.................................. 15

Zoning.. 19

ROP Color... 21

Home Delivery of Sunday/weekend Editions................. 23

LIST OF TABLES

Page

1. Number of Physically Separate Sections in Sunday/weekend Editions
    - a. by Total Newspapers and Circulation.................. 3
    - b. by Circulation Size Groups.......................... 4
2. Sections Appearing Every Week in Sunday/weekend Editions
    - a. by Total Newspapers and Circulation.................. 5
    - b. by Circulation Size Groups.......................... 6
3. Magazine Supplements in Sunday/weekend Editions.............. 8
4. Number of Individual Comic Features in Sunday/weekend Editions.................................. 9
5. Percentage of Sunday/weekend Editions Carrying Listed Standing Features or Columns Every Week
    - a. by Total Newspapers and Circulation.................. 11-12
    - b. by Circulation Size Groups.......................... 13-14
6. Comparative Incidence of Listed Standing Features or Columns in Weekday vs. Sunday/weekend Editions (Newspapers with 100,000+ Circulation)................... 17-18
7. Zoning of Sunday/weekend Editions............................ 20
8. Percent of Newspapers Offering ROP Color in Sunday/weekend Editions
    - a. by Total Newspapers and Circulation.................. 21
    - b. by Circulation Size Groups.......................... 22
9. Percent of Current Sunday/weekend Circulation Home Delivered............................... 24

INTRODUCTION

This report is based on the Newspaper Advertising Bureau's 1987 Newspaper Inventory. The inventory is a mail survey of every daily and Sunday/weekend newspaper in the United States and Canada. This year's study is an expanded update of earlier surveys conducted in 1967, 1974, 1979 and 1983. (The 1967 and 1974 surveys covered weekday editions only.)

The inventory is used to prepare a computerized list of newspapers carrying specific standing features for advertisers and agencies who wish to position advertising near particular kinds of feature content. The 1987 survey of Sunday editions includes data on fifty-eight kinds of standing features as well as comics, magazine supplements and fifteen types of sections. It also contains information on home delivery, zoning and other related subjects.

Summary tables in the report refer only to Sunday/weekend editions published in the United States and are based on completed questionnaires from 522 newspapers, representing 65% of Sunday/weekend editions published (87% of circulation). The results have been weighted to reflect national distribution patterns, based on the following relationships:

Circulation Group:	Sample	Total U.S. Sunday/weekend: Newspapers	Total U.S. Sunday/weekend: Circulation
100,000 & over	23%	16%	69%
50,000 - 99,999	15	14	13
25,000 - 49,999	23	20	10
10,000 - 24,999	23	28	6
Under 10,000	16	22	2
Base: Newspapers responding = 100%	(522)	(799)	(58,825,991)

The study was directed by Charles Lehman of NAB's Research Department, and the report was updated by Dorothy Shea.

A computerized list of the Sunday/weekend editions carrying a particular section or feature is available on request. For information, telephone Dorothy Shea at (212) 704-4557.

FINDINGS

Sections in Sunday and Weekend Newspapers

Sectionalization is a basic fact of life among Sunday and weekend editions. The average number of physically separate sections ranges from three, in the smallest circulation size group, to eleven in the largest. Overall, the average Sunday/weekend edition published in the United States has six physically separate sections (Tables 1a, 1b).

Because sections can be defined by content as well as form, newspapers responding to the survey were asked about fifteen types of "physically separate, labeled or otherwise identifiable" sections. As Table 2a shows, nine of these are carried by more than half of all Sunday/weekend editions responding to the survey: main news (93%); second or local news (58%); comics (86%); sports (90%); TV section or magazine (75%); lifestyle or women (76%); business, finance (67%); editorial or news analysis (67%); and entertainment (58%).

Large-circulation newspapers with large newsholes can usually devote more space to a wider variety of content than small-circulation newspapers can. More than eight out of ten Sunday editions with circulations of 100,000 and over (86%) have an entertainment section, as compared with only 39% of those having circulations under 10,000 (Table 2b). Travel sections are found in 82% of the newspapers in the largest circulation size group, but in only 12% of those in the smallest circulation size group.

Table 1a

Number of Physically Separate Sections in Sunday/weekend Editions

	Newspapers*	Weighted by Circulation**
One	3%	***
Two	10	1%
Three	10	2
Four	15	5
Five	11	4
Six-seven	21	15
Eight-nine	13	23
Ten-eleven	6	16
Twelve-thirteen	4	17
Fourteen & over	5	14
Not reported	3	4
	100%	100%
Average (mean) number of sections	six	nine

Question: On the average, how many physically separate sections does a Sunday or weekend edition of this newspaper have?

* Weighting based on distribution of 799 Sunday/weekend newspapers among five circulation size groups.

** Weighting based on distribution of 58,825,991 circulation among five circulation size groups.

***Less than 0.5%.

Table 1b

Number of Physically Separate Sections in Sunday/weekend Editions
(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
One	-	-	-	2%	10%
Two	-	1%	-	6	36
Three	-	1	1%	13	25
Four	1%	5	21	26	12
Five	1	5	13	21	6
Six-seven	8	39	39	20	4
Eight-nine	24	29	19	5	2
Ten-eleven	20	8	7	2	-
Twelve-thirteen	24	3	-	-	-
Fourteen & over	18	5	1	1	4
Not reported	4	4	-	4	1
Average (mean) number of sections	eleven	seven	six	five	three
Base: Newspapers responding = 100%	(120)	(77)	(118)	(124)	(83)

Question: On the average, how many physically separate sections does a Sunday or weekend edition of this newspaper have?

Table 2a

Sections Appearing Every Week in Sunday/weekend Editions*

	Newspapers**	Weighted by Circulation***
Main news	93%	98%
Second or local news	58	75
Book review	26	46
Business, finance	67	86
Editorial or news analysis	67	81
Entertainment	58	78
Fashion	17	23
Food	16	17
Home	21	35
Lifestyle, women	76	84
Real estate (with editorial content)	34	56
Sports	90	98
TV section or magazine	75	88
Travel	36	70

Question: Which of the following regularly appear as physically separate, labeled or otherwise identifiable sections in Sunday editions?

* Magazine supplements and comics are treated separately; see pages 7-9.

** Weighting based on distribution of 799 Sunday/weekend newspapers among five circulation size groups.

***Weighting based on distribution of 58,825,991 circulation among five circulation size groups.

Table 2b

Sections Appearing Every Week in Sunday/weekend Editions
(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Main news	97%	100%	99%	98%	75%
Second or local news	79	82	64	48	34
Book review	53	38	29	18	6
Business, finance	90	95	78	55	36
Editorial or news analysis	85	82	70	58	53
Entertainment	86	71	58	51	39
Fashion	26	22	16	11	14
Food	18	14	16	16	14
Home	41	30	22	14	11
Lifestyle, women	86	86	81	77	55
Real estate (with editorial content)	68	39	30	21	25
Sports	99	100	98	89	71
TV section or magazine	92	87	77	73	54
Travel	82	68	35	14	12
Base: Newspapers responding = 100%	(120)	(77)	(118)	(124)	(83)

Question: Which of the following regularly appear as physically separate, labeled or otherwise identifiable sections in Sunday editions?

Magazine Supplements and Comic Sections

About seven in ten (71%) of all Sunday/weekend editions published in the United States carry one or more magazine supplements. Staff-written supplements[1] are found in 19% of all Sunday/weekend editions, or about one third (35%) of all Sunday/weekend copies in circulation (Table 3).

Ten percent of all Sunday/weekend newspapers carry two magazine supplements, usually a syndicated supplement plus a staff-written magazine. Among Sunday newspapers with circulations of 100,000 or more, 25% have two supplements.[2]

More than nine out of ten Sunday/weekend editions (93%) include a comic section (94% of all Sunday/weekend copies in circulation). (See Table 4.) A typical Sunday/weekend comic section contains eleven to nineteen individual comic features, but 72% of the newspapers in the largest circulation size group carry twenty features or more.

---

[1] In Table 3, staff-written supplements are those identified as "Sunday" and "Other."

[2] These figures are not shown in Table 3, but may be derived by subtracting the net figure shown from the sum of the figures for USA Weekend, Parade, Sunday and "Other."

Table 3

Magazine Supplements in Sunday/weekend Editions

	Newspapers*	Weighted by Circulation**
Any magazine supplement (net)	71%	93%
Parade	35	56
USA Weekend	27	22
Sunday	4	8
Other	15	27
No magazine supplement	26	5
Not reported	3	2

(By Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Any magazine supplement (net)	97%	97%	87%	66%	27%
Parade	63	53	42	29	5
USA Weekend	14	44	42	27	11
Sunday	10	4	3	3	4
Other	35	10	10	12	11
No magazine supplement	1	3	12	31	67
Not reported	2	-	1	3	6
Base: Newspapers responding = 100%	(120)	(77)	(118)	(124)	(83)

Question: Which of the following magazine supplements does the Sunday or weekend edition carry?

* Weighting based on distribution of 799 Sunday/weekend newspapers among five circulation size groups.

**Weighting based on distribution of 58,825,991 circulation among five circulation size groups.

Table 4

Number of Individual Comic Features in Sunday/weekend Editions

	Newspapers*	Weighted by Circulation**
Comic section (total)	95%	94%
10 features or less	11	2
11 to 19 features	48	29
20 to 29 features	30	46
30 features or more	6	17
No comic section	2	1
Not reported	3	6

(By Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Comic section (total)	92%	97%	96%	96%	92%
10 features or less	-	-	4	15	29
11 to 19 features	21	39	49	64	51
20 to 29 features	48	49	42	15	11
30 features or more	23	9	1	2	1
No comic section	1	-	-	2	7
Not reported	7	3	4	2	1
Base: Newspapers responding = 100%	(120)	(77)	(118)	(124)	(83)

* Weighting based on distribution of 799 Sunday/weekend newspapers among five circulation size groups.

**Weighting based on distribution of 58,825,991 circulation among five circulation size groups.

Editorial Content of Sunday/weekend Newspapers

Although the mix of features varies from one publication to another, American newspapers offer their weekend readers great variety of content. Of 58 features asked about, ten are carried every week in at least seven out of ten Sunday/weekend editions. These are: comics (95%); crossword puzzles (94%); spectator sports (90%); astrology (86%); TV log (82%); participant sports (81%); business, financial (79%); weather map (73%); social news (71%) and Op Ed page (70%) (Table 5a).

With the exception of a very few topics like "farm and ranch" or "school news," most kinds of standing features are carried by a larger percentage of big-circulation than small-circulation newspapers (Table 5b). This is why the figures for Sunday/weekend copies in circulation look very different from the figures based on newspapers (Table 5a).

In all, eighteen of the listed standing features or columns are carried in at least seven out of ten copies in circulation: crossword puzzle (98%); spectator sports (96%); business, finance (95%); comics (94%); TV log (94%); weather map (94%); astrology (90%); Op Ed page (89%); travel and resort (84%); participant sports (83%); books (81%); personal advice (81%); TV reviews (77%); security and commodity quotations (75%); theater (74%); social news (73%); bridge (73%); and "people" (70%).

Table 5a

Percentage of Sunday/weekend Editions Carrying Listed Standing Features or Columns Every Week

	Newspapers*	Weighted by Circulation**
Advice on personal finance	43%	55%
Astrology	86	90
Automotive	19	31
Beauty	15	23
Best food buys	13	12
Books (reviews)	52	81
Bridge	61	73
Business, financial	79	95
Career advice	12	25
Child care	10	21
College	7	7
Computers, personal	12	22
Consumers, "Action Line"	15	27
Crossword puzzle	94	98
Diet, nutrition	17	26
Environment, ecology	7	12
Etiquette	20	44
Farm and ranch	20	19
Fashion, men	7	9
Fashion, women	20	31
Fashion, teenage	8	9
Gardening	27	50
Health and medical	36	47
Home building, repair	25	41
Home furnishings, decorating	19	34
Household hints	30	39
Movie reviews	42	64
Movie timetable	46	63
Music, record, tapes, CDs	33	57
Op Ed page	70	89
Outdoors: camping, fishing, etc.	44	67
"People"	48	70

Table 5a (continued)

Percentage of Sunday/weekend Editions Carrying Listed Standing Features or Columns Every Week

	Newspapers*	Weighted by Circulation**
Personal advice	67%	81%
Pets	17	26
Photography	12	22
Physical Fitness	9	12
Radio log	20	44
Real estate (other than ads)	37	64
Recipes	25	32
Religion	40	44
Restaurants	22	41
Retirement, senior citizens	16	23
School news (grade, high)	35	24
Science, technology	10	18
Security & commodity quotations	47	75
Sewing patterns	33	45
Social news	71	73
Sports (spectator)	90	96
Sports (participant)	81	83
Stamps, coins	19	40
TV reviews	56	77
TV log	82	94
Theater	45	74
Travel & resort	47	84
Video tape reviews	13	29
Weather map	73	94
Wine	6	14
Youth	12	14

Question: How often does your Sunday or weekend edition carry the the following standing features or columns?

* Weighting based on distribution of 799 Sunday/weekend newspapers among five circulation size groups.

**Weighting based on distribution of 58,825,991 circulation among five circulation size groups.

Table 5b

Percentage of Sunday/weekend Editions Carrying Listed Standing Features or Columns Every Week
(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Advice on personal finance	59%	58%	42%	39%	25%
Astrology	91	91	92	84	78
Automotive	37	26	18	14	7
Beauty	27	17	12	10	13
Best food buys	12	9	13	15	16
Books (reviews)	92	71	60	36	22
Bridge	76	71	74	53	42
Business, financial	98	97	90	73	48
Career advice	33	16	5	6	10
Child care	26	12	8	6	2
College	8	5	4	7	11
Computers, personal	27	16	11	10	2
Consumers, "Action Line"	33	19	19	15	4
Crossword puzzle	99	100	98	91	88
Diet, nutrition	30	30	19	27	10
Environment, ecology	14	12	13	5	5
Etiquette	55	29	15	7	8
Farm and ranch	18	25	19	19	19
Fashion, men	10	5	5	7	7
Fashion, women	37	25	17	15	14
Fashion, teenage	9	6	8	6	8
Gardening	60	39	25	21	6
Health and medical	51	39	38	36	22
Home building, repair	46	39	29	15	8
Home furnishings, decorating	40	30	15	14	8
Household hints	43	34	27	27	23
Movie reviews	71	57	53	33	14
Movie timetable	69	55	53	39	28
Music, records, tapes, CDs	68	44	36	25	7
Op Ed page	93	94	84	62	37
Outdoors: camping, fishing, etc.	75	62	46	34	19
"People"	78	70	47	38	27

Table 5b (continued)

Percentage of Sunday/weekend Editions Carrying Listed Standing Features or Columns Every Week

(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Personal advice	87%	78%	64%	66%	47
Pets	30	17	16	17	8
Photography	25	19	12	7	6
Physical fitness	13	8	10	10	5
Radio log	55	29	14	8	11
Real estate (other than ads)	75	55	36	20	23
Recipes	36	23	22	22	25
Religion	45	44	50	32	34
Restaurants	50	22	22	17	7
Retirement, senior citizens	26	19	13	15	13
School news, (grade, high)	18	36	30	42	42
Science, technology	21	14	11	6	4
Security & commodity quotations	85	71	50	35	18
Sewing patterns	48	48	41	25	16
Social news	74	68	75	75	63
Sports (spectator)	97	97	94	90	76
Sports (participant)	82	91	84	78	76
Stamps, coins	49	30	17	10	4
TV reviews	85	68	63	48	33
TV log	97	91	85	77	70
Theater	85	60	50	33	16
Travel & resort	95	83	59	21	12
Videotape reviews	38	9	14	9	4
Weather map	99	91	92	67	34
Wine	18	6	4	2	2
Youth	14	13	15	11	10
Base: Newspapers Responding = 100%	(120)	(77)	(118)	(124)	(83)

Question: How often does your Sunday or weekend edition carry the following standing features or columns?

How Do Standing Features in Sunday and Weekday Editions Compare?

In order to compare the standing features in weekday and Sunday/weekend editions, a special analysis was made for large newspapers: those with circulations of 100,000 or more.[3] Not surprisingly, this comparison shows that Sunday/weekend editions carry more standing features on an every-issue basis than weekday editions do (Table 6). In a few cases, the difference is so extreme that it would be fairly accurate to describe certain kinds of content as "Sunday" newspaper features. For example, 95% of these big-circulation newspapers report that every Sunday/weekend edition carries a "travel and resort" feature, but only 4% report that such a feature appears in every weekday edition.

In the case of some features, however, this difference favoring Sunday over weekend editions may be more apparent than real, especially in the light of the increasing number of once-a-week special sections in weekday editions. For example, 36% of Sunday editions but only 3% of weekday editions carry "recipes" in every issue. However, 93% of big-circulation newspapers carry recipes in at least one of their five weekday editions.

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[3] This circulation size group was used because the great majority of these Sunday/weekend editions are published by daily newspapers in the same category.

Both reading and advertising patterns are likely affected by the weekly "schedule" on which features appear. Readers with special interests such as "photography" or "gardening" may make more of an effort to read editions in which those features appear. Advertisers looking for a compatible editorial environment are likely to advertise in the same editions, because special-interest readers tend to be interested in ads as well as editorials.

Table 6

Comparative Incidence of Listed Standing Features or Columns in Weekday vs. Sunday/weekend Editions

(Newspapers with 100,000+ Circulation)

	Every Issue:	
	Weekday	Sunday
Advice on personal finance	19%	59%
Astrology	93	91
Automotive	6	37
Beauty	5	27
Best food buys	-	12
Books	10	92
Bridge	87	76
Business, financial	94	98
Career advice	2	32
Child care	6	26
College	2	7
Computers, personal	3	27
Consumers, "Action Line"	31	33
Crossword puzzle	97	99
Diet, nutrition	5	30
Environment, ecology	6	14
Etiquette	7	55
Farm and ranch	7	18
Fashion, men	1	10
Fashion, women	5	37
Fashion, teenage	2	9
Gardening	-	60
Health and medical	30	51
Home building, repair	-	46
Home furnishings, decorating	1	40
Household hints	19	42
Movie reviews	44	71
Movie timetable	64	69
Music, records, tapes, CDs	11	67
Op Ed page	88	93
Outdoors: camping, fishing, etc.	10	75
"People"	78	77

Table 6 (continued)

Comparative Incidence of Listed Standing Features or Columns in Weekday vs. Sunday/weekend Editions
(Newspapers with 100,000+ Circulation)

	Every Issue: Weekday	Every Issue: Sunday
Personal advice	88%	87%
Pets	3	30
Photography	-	25
Physical fitness	5	13
Radio log	43	55
Real estate (other than ads)	3	75
Recipes	3	36
Religion	1	45
Restaurants	5	50
Retirement, senior citizens	4	26
School news (grade, high)	17	18
Science, technology	9	21
Security & commodity quotations	86	85
Sewing patterns	30	48
Social news	38	74
Sports (spectator)	95	97
Sports (participant)	59	82
Stamps, coins	3	49
TV reviews	85	85
TV log	95	97
Theater	52	85
Travel & resort	4	95
Videotape reviews	3	37
Weather map	95	99
Wine	-	18
Youth	7	14

Zoning

In every circulation size group, zoning is somewhat less common among Sunday/weekend editions than for weekday editions. However, larger Sunday editions typically have wider distribution areas, and some are enhancing their appeal by providing special, zoned editorial content for different geographical segments in their area. Overall, 27% of Sunday/weekend editions report zoning (Table 7), as do 30% of weekday editions. Among news- papers of 100,000 circulation and more, 79% report zoning for weekday editions, as compared with 49% for Sunday/weekend editions.

Table 7

Zoning of Sunday/weekend Editions

	Newspapers*	Weighted By: Circulation **
Zoning:	27%	43%
For editorial content and advertising	18	35
For advertising only	9	8
No zoning	69	54
Not reported	4	3

(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Zoning	49%	44%	26%	15%	14%
For editorial content and advertising	41	35	13	5	8
For advertising only	8	9	13	10	6
No zoning	48	53	69	78	84
Not reported	3	3	5	7	2
Base:	(120)	(77)	(118)	(124)	(83)

Question: To what extent are Sunday or weekend editions zoned?

* Weighting based on distribution of 799 Sunday/weekend newspapers among five circulation size groups.

**Weighting based on distribution of 58,825,991 circulation among five circulation size groups.

ROP Color

Nearly all of the Sunday/weekend editions (96%) report availability of ROP spot color (Table 8a). Slightly fewer (90%) offer full color. There is little variation in ROP color availability among newspapers of differing circulation size groups (Table 8b).

Table 8a

Percent of Newspapers Offering ROP Color in Sunday/weekend Editions

	Newspapers*	Weighted by Circulation**
ROP Spot Color		
Available	96%	96%
Not available	0	1
Not reported	4	3
ROP Full color		
Available	90%	92%
Not available	4	4
Not reported	6	3

Question: Is ROP color available to advertisers in your Sunday/weekend edition?

* Weighting based on distribution of 799 Sunday newspapers among five circulation size groups.

**Weighting based on distribution of 58,825,991 circulation among five circulation size groups.

Table 8b

Percent of Newspapers Offering ROP Color in Sunday/weekend Editions
(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
ROP Spot Color					
Available	97%	92%	98%	95%	95%
Not available	1	-	-	2	-
Not reported	2	8	2	4	5
ROP Full Color					
Available	92	90	96	89	87
Not available	5	4	3	4	5
Not reported	3	6	2	7	8
Base: Newspapers responding = 100%	(120)	(77)	(118)	(124)	(83)

Home Delivery of Sunday/weekend Editions

About seven out of ten Sunday/weekend editions (73%) indicate that at least 70% of their total circulation is home delivered (Table 9). Overall, the median percentage is 83%. Within circulation size groups, the ratio of home delivered copies to total circulation generally appears to be similar for weekdays and Sundays.[4]

---

[4] This is consistent with a 1982 study conducted by Audits and Surveys, Inc., showing that among those adults who have any newspaper home delivered, 72% have both weekday and Sunday delivery. The remainder is split about evenly between those with weekday-only delivery (16%) and those with Sunday-only delivery (12%).

Table 9

Percent of Current Sunday/weekend Circulation Home Delivered

	Newspapers*	Weighted by Circulation**
Under 60%	7%	8%
60% to 69%	12	16
70% to 79%	17	25
80% to 89%	30	30
90% or more	26	11
Not reported	8	9
Median	83	78

(by Circulation)

	100,000 & Over	50,000-99,999	25,000-49,999	10,000-24,999	Under 10,000
Under 60%	10%	4%	6%	5%	11%
60% to 69%	18	19	12	7	8
70% to 79%	30	12	17	18	12
80% to 89%	28	41	26	33	24
90% or more	5	14	32	32	35
Not reported	9	10	7	5	10
Median	76	82	85	85	86
Base: Newspapers responding = 100%	(120)	(77)	(118)	(124)	(83)

Question: Approximately what percentage of your current Sunday or weekend circulation is home delivered?

* Weighting based on distribution of 799 Sunday/weekend newspapers among five circulation size groups.

**Weighting based on distribution of 58,825,991 circulation among five circulation size groups.

A8600-8.45F

SMALL HOUSEHOLDS

Their Composition And Marketing Potential

Newspaper Advertising Bureau, Inc.
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SMALL HOUSEHOLDS

Their Composition and Marketing Potential

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

October 1987

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HIGHLIGHTS

Census data and special tabulations for adults 18 to 64, from Simmons Market Research Bureau's 1986 Study of Media & Markets indicate that:

- Only a minority of adults in this age group live in one-person (8%) or two-person (27%) households. However, these two household sizes account for more than 50 million individuals under the age of 65.

- People living in small households do not represent a distinctive market segment in the usual sense, partly because they include both sexes and a range of ages, and also because residence in a small household may be temporary rather than permanent.

- People in one-person households are above average on several measures of socio-economic status, including college degrees and professional employment. The data for women living alone suggest that those under age 35 have greater employment opportunities, a career orientation and higher expectations than women 35 to 64 years old. Women under 35 appear to live somewhat "better" than their median household income would indicate. Younger and older men who live alone show comparatively minor differences on socio-economic measures.

- Among those who are 35 to 64 years old, 64% of the men and 79% of the women who live alone are separated, divorced or widowed. Some people in this group may be under considerable strain, because the break-up of a marriage or the death of a spouse is a major life crisis that can disrupt personal adjustment and customary living patterns.

- The median age for men in one-person households is ten years below the comparable statistic for women (33.9 years vs 43.7 years). This reflects the fact that men 35 to 64 years old are more likely than women in this age group to marry or remarry.

- Since adults living alone don't have to adapt to the wishes of other household members, they may be highly individualized in their leisure activities and spending patterns. This would be particularly true for the high proportion who live in central cities, where anonymity can be the rule.

- In one-person households, financial difficulties are most common among women 35 to 64. The median income of this group is only $14,025, and 37% have incomes under $10,000. Men 35 to 64 living alone have the highest per capita income of any of the small household types analyzed, but there are several hints that they tend to live "beneath their station". This may reflect personal or financial problems associated with separation or divorce.

- Married couples living in two-person households are very similar to the total adult population age 18 to 64. This group has the highest median age (49.6 years), the highest median household income and the highest level of home ownership. Many probably live in "empty nest" households.

- Adults 18 to 64 living in "other" types of two-person households are difficult to characterize because they represent so many different kinds of family and non-family relationships. On the whole, this group tends to have somewhat lower socio-economic status than others in small households.

- The newspaper reading habits of people living in small households may be influenced by other demographic factors, such as age, as well as by size of household. Among those over 35, the weekday and Sunday readership figures show parallel variations, with the level of both weekday and Sunday reading being lowest for men living alone and highest for married couples. Among those under 35 years old, daily newspaper readership is variable, but Sunday readership is quite constant.

- With their high per-capita median income, small households represent important markets for many products and services. For example, women under 35 years old who live alone are good prospects for high fashion and travel advertisers. Married couples with no children at home are likely to have large disposable incomes that make them attractive to a broad spectrum of marketers.

CONTENTS

Page

HIGHLIGHTS.. iii

INTRODUCTION...xiii

Why Small Households Are Important..........................xiii
How the Analysis Was Conducted.............................. xvi

DETAILED FINDINGS

I. WORKING AGE ADULTS: WHO ARE THEY?.......................... 1

How Many Live in Small Households?........................ 1
Splitsville, USA.. 3
Where Do They Live?....................................... 4
They Are Well Educated, Especially the Younger Ones....... 5
Most of Them Work Full-time............................... 6
A High Proportion of Younger Adults Have High-Status Occupations.......................... 8
Per-Capita Income is Above Average in Small Households.... 9
--But Medians Don't Tell The Whole Story on Incomes....... 10
Their Racial Make-up Mirrors the Population--Almost....... 11
How Many Are Home Owners?................................. 12
How About Their Voting Record?............................ 13
Some Implications of Living in Small Households........... 14

II. MEDIA USAGE, LEISURE AND CONSUMPTION PATTERNS............... 17

Daily Newspaper Readership................................ 17
Reading Over Five Weekdays................................ 18
How About Sunday Readership?.............................. 19
Paperback Book Purchases.................................. 21
Television Viewing.. 22
Theater Going... 23
Moviegoing.. 24
Foreign Travel.. 25
Credit Card Ownership..................................... 26
Investments... 27
Alcoholic Beverages: Distilled Liquor..................... 28
Implications of Chapter II................................ 29

LIST OF TABLES

Page

1. U.S. Population and Number of Households: 1970-1985........... xiii
2. Household Size and Average Population per Household........... xiv
3. Percent of Adults Living in Households of Various Sizes........ xv
4. Percent of Adults Living in Households of Various Sizes: 1980-1986........................ xv
5. Distribution of Adults 18-64, by Size and Type of Household.... 2
6. Percentage Who Are Single, Divorced or Separated.............. 3
7. Percentage of Adults 18-64 Who Are Central City Residents...... 4
8. Percentage of College Graduates Among Adults 18-64............ 6
9. Percentage Employed Full-time Among Adults 18-64.............. 7
10. Percentage of Professionals and Managers Among Adults 18-64.... 8
11. Median Household Income of Adults 18-64....................... 9
12. Percentage of Adults with Household Incomes Under $10,000...... 10
13. Racial Composition of Adults in Small Households.............. 11
14. Percentage of Adults 18-64 Who Own Their Homes................ 12
15 Percentage Who Voted in Last Twelve Months (Federal, state or local election)............................ 13
16. Daily Newspaper Readership.................................... 17
17. Daily Newspaper Coverage Over Five Weekdays................... 19
18. Sunday Newspaper Coverage (Average Weekend)................... 20

Page

19. Paperback Book Purchases in Last Twelve Months................. 21

20. Average Weekly Hours of TV Viewing........................... 22

21. Percentage Reporting Live Theater Attendance (in last twelve months).. 23

22. Percentage Reporting Moviegoing (in last 90 days).............. 24

23. Reported Foreign Travel in Last Three Years................... 25

24. Percentage Owning One or More Credit Cards.................... 26

25. Percentage Reporting Ownership of Any Type Securities.......... 27

26. Percentage Drinking Any Distilled Liquor...................... 28

INTRODUCTION

Why Small Households Are Important

Census Bureau estimates indicate that between 1970 and 1985, the number of households in the United States grew by 36.9%. During the same fifteen-year period, the number of people living in households increased by only 17.3% (Table 1).

Table 1

U.S. Population and Number of Households: 1970-1985

	1970	1975	1980	1985
Total households	63,401	71,120	80,776	86,789
Population in hhs	199,030	209,008	222,540	233,516

Source: Current Population Reports, Series P-20, No. 411, March 1985, Department of Commerce, Bureau of the Census. (All figures are in 000s.)

The Census Bureau figures shown in Table 1 show a strong trend toward smaller households and a drop in the average number of residents per household from 3.14 in 1970 to 2.69 in 1985. In just fifteen years, the number of two-person households grew by 49.4% while the number of single-person households virtually doubled, showing a growth rate of 89.9% (Table 2). At the same time, the number of households containing five or more persons decreased by 26.9%. Single-person and two-person households now account for more than half (55.3%) of all households.

Table 2

Household Size and Average Population per Household: 1970-1985

	1970	1985	% Change
One person household	10,851	20,602	+ 89.9
Two person household	18,333	27,389	+ 49.4
Three-four person hh.	20,940	29,096	+ 38.9
Five or more person hh.	13,277	9,703	- 26.9
Average pop. per hh.	3.14	2.69	- 14.3

Source: Current Population Reports, Series P-20, No. 411, March 1985, Department of Commerce, Bureau of the Census. (All figures in 000s, except average population per household.)

The forces behind the trend to smaller households have been widely discussed by social scientists. Among the factors mentioned are later marriage, high divorce rates, increased longevity, more effective birth control methods, and an increased tendency to remain single.

Data from Simmons Market Research Bureau indicate that adults between the ages of 18 and 64 are more than four times as likely as people of retirement age to live in larger households (those consisting of three or more persons). Conversely, those who are 65 or older are four times as likely to live alone (Table 3). People 65 and older account for only 15.7% of all adults but represent 42% of the one-person households and 27% of the adults in two-person households. Among those over 65 who live alone, the ratio of women to men is almost four to one (6.8 million vs. 1.8 million), mainly because of the male/female difference in life expectancy.

Table 3

Percent of Adults Living in Households of Various Sizes
(by age)

Number in Household	Total Adults	18-64 Years	65 or Older
One person	11.9%	8.2%	31.9%
Two persons	31.1	27.0	53.0
Three or more persons	57.0	64.8	15.1
Adult population (in 000s)	(171,205)	(144,257)	(26,948)

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets.

The trend to smaller households may not be permanent; future economic and social conditions may once again produce an increase in average household size. In fact, SMRB estimates suggest that the percentage of adults currently living in households with three or more persons may be somewhat higher than it was six years ago. The differences between the 1980 and 1986 figures are quite small, but they are consistent across age groups (Table 4).

Table 4

Percent of Adults Living in Households of Various Sizes: 1980-1986

Number in Household	18-64 years		65 or older	
	1980	1986	1980	1986
One person	8.3%	8.2%	31.2%	31.9%
Two persons	28.9	27.0	56.8	53.0
Three or more persons	62.8	64.8	12.0	15.1

Source: Simmons Market Research Bureau,
1980/1986 Study of Media & Markets

Whatever the future brings, single-person and two-person households now represent more than half (55.3%) of all households in the United States. This makes it essential for marketers and media to understand what the people living in these small households are like, as well as how they spend their time and money.

How the Analysis Was Conducted

A great deal has been written about "senior citizens" who live alone. On the other hand, relatively little attention has been devoted to the characteristics, leisure activities, and media usage of adults under age 65 who live alone or in two-person households. Accordingly, the data base for this analysis was limited to adults between the ages of 18 and 64.

The data analyzed are derived from a special tabulation of data from the 1986 Study of Media & Markets, by Simmons Market Research Bureau. In order to develop finer discriminations and thereby arrive at a more detailed picture of adults age 18 to 64 living in small households, the following analytic groupings were specified:

One-person household

- Men, 18 - 34
- Men, 35 - 64
- Women, 18 - 34
- Women, 35 - 64

Two-person household:

- Married, 18 - 34
- Married, 35 - 64
- Other than married, 18 - 34
- Other than married, 35 - 64

The SMRB data analyzed are based on surveys of adults, not households. This may produce some confusion in the case of two-person households. For example, in two-person households where the respondent is between 18 and 64 years of age, the second household member might have been a child or someone 65 or older.

SMRB estimates are based on a total sample of more than 19,000 adults. Nevertheless, detailed cross-tabulations can sometimes result in bases that are quite small. The report attempts to minimize the problem of small bases by focusing on activities and buying patterns that involve at least 10% of all adults, even though this means that some intriguing possibilities are left unexplored.

Analyses based on cross-tabulations of syndicated research data can seldom address the kinds of issues that can be tackled through custom surveys. In a few cases, it may be possible to draw inferences about attitudes and motivations from media usage patterns, leisure activities or reported buying, but conclusions based on such data remain speculative.

This report focuses mainly on descriptive background and broader issues: How many adults live in one-person and two-person households? Can the people in small households be thought of as a single market? How do they differ from the general population in demographics, media usage and buying patterns?

Charles Lehman of NAB's Research Department analyzed the data and wrote the report.

I. WORKING AGE ADULTS: WHO ARE THEY?

How Many Live in Small Households?

This report focuses on adults 18 to 64 years old in small households, but it should be pointed out that a majority of this age group (64.8%) lives in *larger* households having three or more members (Table 5).

Almost 12 million (8% of adults under 65) live alone. These single-person households are evenly split between men and women, but more men who live alone are under 35, whereas more of the women are over 35. Median ages are 33.9 years for the men and 43.7 years for the women (not shown in table).

More than one in four adults of working age (27%) live in two-person households, and nearly two-thirds of these are married-couple households. The median age of respondents in married-couple households is 49.6 years, so a large proportion of these households are "empty nests" with adult children living elsewhere.

Respondents living in all other types of two-person households are much younger, having a median age of only 32.0 years. More than 13 million Americans of working age live in these "other" two-person households. About one-fourth (26%) of the women householders live with a child under 18 years of age, but only 4% of the male householders share their quarters with a child (not shown in table).

Table 5

Distribution of Adults 18-64, by Size and Type of Household

	Number (in 000s)	Percent
Total adults, 18-64 years	144,257	100.0%
One-person household	11,834	8.2%
Male, 18-34	3,183	2.2
Male, 35-64	2,713	1.9
Female, 18-34	2,286	1.6
Female, 35-64	3,652	2.5
Two-person household	38,953	27.0%
Married, 18-34	7,176	5.0
Married, 35-64	18,262	12.6
All other, 18-34	8,022	5.6
All other, 35-64	5,493	3.8
Three or more persons in household	93,470	64.8%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

Splitsville, USA

Obviously, most people who live alone are single, separated, divorced or widowed (Table 6). (However, about 2% of all adults in one-person households report that they are married.) Among those under age 35, single men and women predominate; among those age 35 to 64, the majority were formerly married.

Table 6

Percentage Who Are Single, Separated, Divorced or Widowed

	18-34 Years		35-64 Years	
	Single	SDW[a]	Single	SDW[a]
One-person household, male	76%	22%	33%	64%
One-person household, female	84	15	18	79
Two-person household, married	-	-	-	-
Two-person household, all other	78	21	26	71
Total men[b]	52%	8%	7%	12%
Total women[b]	38%	10%	5%	24%

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets.

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[a] Separated, divorced or widowed.

[b] In this table and all similar tables, "total" refers to all adults of the specified age group and sex, without regard to household size.

Where Do They Live?

People who live alone or in two-person households are more likely than other adults to be central city residents, with the exception of married couples living together (Table 7). About half of the adults under age 35 who live alone are found in central cities, as compared with only 34% of their age group overall.

The incidence of central city residency in two-person, married-couple households is almost identical to that found among the total population. Perhaps this is because central city residency tends to decline with age, and adults in two-person, married-couple households have the highest median age of any of the small-household groups analyzed.

Table 7

Percentage of Adults 18-64 Who Are Central City Residents

	18-34 Years	35-64 Years
One-person household, male	50%	39%
One-person household, female	52	38
Two-person household, married	33	26
Two-person household, all other	40	35
Total men	33%	27%
Total women	34%	27%

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets

They Are Well Educated, Especially the Younger Ones

The percentage of college graduates is higher among people who live alone than in the total adult population. For women under age 35, the difference is almost two to one in favor of those who live alone (Table 8). Changing career expectations and brighter employment prospects for women may help explain the high ratio of college graduates in the 18 to 34 year old group.

This sharp increase in educational attainment is not found among younger men in single-person households, but men over 35 are more likely to be college graduates than are women in the same age group. Regardless of age, men who live alone are better-educated than the total male population.

For two-person households, the picture is different: Under age 35, the ratio of college graduates in married-couple households is clearly above average, but this is not true of those over age 35 living in this type of household. The lower ratio of college graduates among those age 35 or older may reflect the special character of "empty nest" families and the fact that this group tends to be the oldest of those analyzed.

Among small households, the two-person, "all other" group has the lowest percentage of college graduates, but even so, their educational level compares favorably with the total population.

Table 8

Percentage of College Graduates Among Adults 18-64

	18-34 Years	35-64 Years
One-person household, male	29%	28%
One-person household, female	33	20
Two-person household, married	27	17
Two-person household, all other	20	17
Total men	19%	24%
Total women	17%	15%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

Most of Them Work Full-Time

In the total population 18 to 64 years of age the percentage of full-time workers is much higher among men than among women, both for those who are 18 to 34 years old and those age 35 or older. (Table 9).

The full-time employment picture is quite different for people living in small households. The proportion of those under 35 who work full-time is much higher than the percent found in the total 18-34 year age group. 84% of the younger women who live alone are employed full-time, compared with 53% of their age group overall (Table 9).

Table 9

Percentage Employed Full-Time Among Adults 18-64

	18-34 Years	35-64 Years
One-person household, male	78%	69%
One-person household, female	84	55
Two-person household, married	83	55
Two-person household, all other	69	61
Total men	73%	78%
Total women	53%	49%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

Table 9 suggests a disturbing question that cannot be answered by syndicated data: Do people living alone who happen to be over age 35 have less financial need for jobs than younger people in the same types of households? Or are some in the 35-64 year age group displaced persons in a rapidly shifting employment picture?[1] Changing markets, foreign competition, automation and advances in technology have eliminated jobs that provided lifetime employment for earlier generations, and older workers may have found it difficult to adapt to the breakneck pace of these changes.

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1) According to the June 8, 1987 issue of Fortune, the median age of American workers has fallen from 39.2 in 1970 to 35.5 today. (See "Seniority Under Siege", p.10)

A High Proportion of Younger Adults Have High-Status Occupations

The proportion of professionals and managers is higher in one-person households than in their total sex and age groups, with the exception of men 35 to 64 (Table 10) Women under 35 who live alone are more than twice as likely to have a high-status occupation as the typical woman in this age group.

Among adults under age 35 living alone, more women than men report that they work as professionals or managers. Among those over age 35, the reverse is true. In either case, it is important to remember that this is a very broad occupational category, and that the terms "professionals" and "managers" connote different types of employment for men and women.

Table 10

Percentage of Professionals and Managers Among Adults 18-64

	18-34 Years	35-64 Years
One-person household, male	25%	24%
One-person household, female	31	20
Two-person household, married	24	18
Two-person household, all other	15	21
Total men	15%	27%
Total women	14%	16%

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets

Per-Capita Income Is Above Average in Small Households

The question of whether two can live as cheaply as one may be very relevant for people in small households. Of the small household types analyzed, two-person households consisting of a married couple have the highest median income, but men living alone and women under age 35 who live alone have higher per-capita incomes (Table 11).

In one-person households, the median income for women under age 35 is 88% of the median for men in that age group. Among those 35 to 64, the women's median income is only 67% of the men's. This may be another indication of improving employment prospects for younger women.

Table 11

Median Household Income of Adults 18-64

	18-34 Years	35-64 Years
One-person household, male	$18,500	$21,000
One-person household, female	16,300	14,025
Two-person household, married	29,375	28,125
Two-person household, all other	22,150	21,510
Total men	$27,675	$31,425
Total women	$25,525	$28,350

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets

--But Medians Don't Tell The Whole Story on Incomes

While median income figures are useful, they can conceal important differences among groups. For example, Table 11 provides no information on the extent to which adults living in the various types of small households may be economically disadvantaged.

Table 12, which shows the percentage with household incomes under $10,000, suggests that serious financial problems may be common among women ages 35 to 64 who live alone, and also in two-person households that do not consist of married couples. Conversely, married couples in two-person households are less likely than adults in general to fall into this low income bracket.

Table 12

Percentage of Adults With Household Incomes Under $10,000

	18-34 Years	35-64 Years
One-person household, male	20%	23%
One-person household, female	23	37
Two-person household, married	6	9
Two-person household, all other	18	23
Total men	10%	10%
Total women	15%	12%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

Their Racial Make-up Mirrors the Population--Almost

On the whole, the racial composition of adults in small households resembles that of the total population, with two exceptions. The most notable difference is that blacks are underrepresented in two-person households consisting of a married couple (Table 13). The second exception is that the percentage of blacks among those over age 35 may be slightly higher in the three other types of small households than in the total population.

In the total population, the median age of blacks is lower than the median age of whites because of differences in birth rates and longevity (not shown in table).

Table 13

Racial Composition of Adults in Small Households

	18-34 Years		35-64 Years	
	White	Black	White	Black
One-person household, male	84%	13%	83%	14%
One-person household, female	85	12	85	13
Two-person household, married	92	6	93	7
Two-person household, all other	85	13	83	15
Total men	85%	12%	89%	9%
Total women	83%	14%	88%	10%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

How Many Are Home Owners?

As would be expected, the level of home ownership among people who live in small households is generally below average. The exception is two-person, married-couple households, many of which can more accurately be described as "formerly large" households (Table 14).

Among those who are over age 35, home ownership is more prevalent, but older men living alone are least likely to own their homes. This may reflect the high proportion of the separated and divorced in this group (See Table 6) and possibly, the terms of their divorce settlements.

Table 14

Percentage of Adults 18-64 Who Own Their Homes

	18-34 Years	35-64 Years
One-person household, male	25%	46%
One-person household, female	16	59
Two-person household, married	53	86
Two-person household, all other	31	62
Total men	57%	79%
Total women	52%	80%

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets

How About Their Voting Record?

Does living in small households tend to isolate people from the wider society? Reported voting behavior over the past twelve months returns a mixed verdict on this question (Table 15). For those under age 35, three of the four small household types are above the norm for their age group. However, among those 35 to 64 years old, three of the four small household types are below the norm.

Overall, reported voting is significantly higher among those 35 to 64 than among younger adults. However, few age differences are found among men and women who live alone. If anything, the level of voting may be lower among such residents over age 35.

Table 15

Percentage Who Voted in Past Twelve Months
(Federal, state or local election)

	18-34 Years	35-64 Years
One-person household, male	34%	31%
One-person household, female	37	36
Two-person household, married	35	44
Two-person household, all other	28	33
Total men	31%	42%
Total women	30%	41%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

Some Implications of Living in Small Households

Living in a small household is not a lifelong condition. Some of the younger adults now living alone will marry, while those already married may have children. Among older adults, some who are now separated, divorced or widowed may remarry. However, as some now living in small households become members of larger households, other Americans will be making the opposite transition. On the whole, the trend in the proportion of adults ages 18 to 64 living in one- or two-person households has changed very slowly over time. A different mix of individuals will be found in small households, but the demographic segments represented can be expected to remain fairly constant over the near term.

Do people live in small households by choice or because they feel they have no other options? This important question cannot be answered simply on the basis of demographic trends. Overall, from the data shown in this chapter one can infer that younger adults are more likely than older adults to live in small households by choice.

One- and two-person households represent several distinct segments. Among women living alone, many differences exist between the younger and older groups. The younger women have higher incomes and are more likely to be college graduates. Their exceptionally high level of full-time employment may reflect a newly won conception of themselves as career women rather than as marginal or part-time workers.

On the other hand, women ages 35 to 64 who live alone have the lowest median income of any of the four single-person household types analyzed, as well as the lowest level of full-time employment. Four out of five are separated, divorced or widowed.

These thumbnail descriptions suggest that among women living alone, the 18 to 34 year olds are prime prospects for designer clothes, foreign travel and other upscale products and services. However, older women who live alone are almost four times as likely to own their homes, so their median disposable income may be higher than the median household income would indicate. Even so, typical spending patterns for younger and older women living alone are very different.

The differences between younger and older men living alone are less striking. Younger men are more likely to be central city residents; the older men have a higher median income and a higher incidence of separation and divorce. The two age groups have similar proportions of college graduates, as well as of professionals and managers. Overall, these data suggest that younger and older men living alone may show fewer differences in spending patterns than their female counterparts do.

Why should the patterns found among younger and older women in single-person households be so unlike the patterns found for men who live alone? The most fundamental reason would appear to be that the conditions of female employment, and consequently, women's expectations, have changed more dramatically in recent years. One measure of this change is the striking difference in the percentage of college graduates among younger (33%) and older (20%) women living alone.

Two-person households occupied by a married couple appear to be very much in the mainstream of American life. More than 25 million people live in this type of household, and they have the highest median household income (but not the highest per capita income) of any of the small household groups analyzed.

The percentage of homeowners among married-couple households is significantly higher than for the other small household groups. This might imply a more stable household with closer ties to the surrounding community. It also underscores the fact that two-person, married-couple households are prime prospects for home furnishings and all kinds of home maintenance products.

The nature of "other" two-person households is more elusive, mainly because there are so many possible combinations: mother and child; father and child; POSSLQ (persons of the opposite sex sharing living quarters); related adults of the same sex; and unrelated adults of the same sex. The implications for consumer behavior are too varied to permit any easy generalization.

II. MEDIA USAGE, LEISURE AND CONSUMPTION PATTERNS

Daily Newspaper Readership

Daily newspaper readership varies with both age and sex. Overall, weekday coverage is higher among adults 35 to 64 than for younger adults, and somewhat higher for men than for women (Table 16).

Weekday coverage for men living alone is 58%, regardless of age--about average for men under 35, but far below the average for men 35 to 64. Average weekday readership for women who live alone increases beyond age 35, but not to the extent seen in the total female population.

Table 16

Daily Newspaper Readership
(Average Weekday Coverage)

	18-34 Years	35-64 Years
One-person household, male	58%	58%
One-person household, female	57	64
Two-person household, married	53	72
Two-person household, all other	53	63
Total men	59%	70%
Total women	52%	68%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

Regardless of marital status, younger adults in two-person households show a lower level of daily reading than younger adults who live alone (Table 16). This is an unexpected finding, because daily readership overall shows the reverse pattern. For example, on an average weekday, the newspaper reaches 65% of all adults living in two-person households, but only 59% of those living alone (not shown in table).

The data at hand shed little light on _why_ daily newspaper readership should be so low among young adults living in two-person households, but the question is important because more than 15 million people live in this kind of household. (See Table 5.)

Reading Over Five Weekdays

Over five weekdays the daily newspaper reaches about eight out of ten working-age Americans living in small households (Table 17). The fairly large difference in coverage for one weekday and five weekdays reflects an above average turnover rate from day to day. In other words, the great majority of the small household population read daily newspapers, but they may not read every weekday.

Table 17

Daily Newspaper Coverage Over Five Weekdays

	18-34 Years	35-64 Years
One-person household, male	82%	76%
One-person household, female	81	81
Two-person household, married	76	85
Two-person household, all other	80	81
Total men	82%	87%
Total women	79%	84%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

How About Sunday Readership?

Average Sunday coverage of the newspaper in small households reveals a very different picture than weekday reading. Among adults under 35, the level of readership shows little variation, regardless of sex, marital status or household size (Table 18). Furthermore, for single-issue coverage the Sunday figure is consistently higher than the weekday figure among these younger adults (See Table 16). This indicates that for this generation, the Sunday reading habit is more firmly entrenched than weekday reading is.

Table 18

Sunday Newspaper Coverage
(Average Weekend)

	18-34 Years	35-64 Years
One-person household, male	61%	55%
One-person household, female	61	65
Two-person household, married	62	71
Two-person household, all other	60	60
Total men	62%	67%
Total women	60%	68%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

The Sunday and weekday reading patterns of older adults in small households are more consistent than those found for younger people: Among adults who are 35 to 64 years old, the level of reading, on both weekday and Sunday, is lowest for men living alone and highest for married adults in two-person households. In contrast to those under 35, older adults appear to have an equal or slightly greater commitment to weekday editions than to the Sunday newspaper (Compare Tables 16 and 18).

Paperback Book Purchases

Simmons does not ask respondents about book reading, but does collect information on both hard cover and paperback book purchases. Paperback buying may be more closely related to personal interest in reading, since paperbacks are less likely to be purchased as gifts or textbooks.

To the extent that these purchases reflect actual use, the data indicate that reading is more common among younger adults in small households than among other adults 18 to 34 years old (Table 19). On the other hand, adults 35 to 64 in small households (especially women) may be somewhat less likely than others in their age group to be book readers.

Table 19

Paperback Book Purchases in Last Twelve Months

	18-34 Years	35-64 Years
One-person household, male	38%	31%
One-person household, female	50	35
Two-person household, married	40	33
Two-person household, all other	38	37
Total men	33%	32%
Total women	43%	41%

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets

Television Viewing

In one-person households, the men tend to watch more TV than others in their age group, while the women tend to watch less (Table 20). The differences are especially notable for women under 35, who average roughly 18 hours a week, and men 35 to 64, who average about 26 hours.

Whether they live in large or small households, adults 35 to 64 report more hours of viewing than younger adults do. This suggests that older adults are more likely to spend evenings at home. Also, the lower proportion of full-time workers in this age group allows more time for TV viewing. (See Table 9.)

Table 20

Average Weekly Hours of TV Viewing

	18-34 Years (hrs)	35-64 Years (hrs)
One-person household, male	21.7	25.9
One-person household, female	18.1	24.3
Two-person household, married	19.1	25.7
Two-person household, all other	21.0	23.6
Total men	20.4	22.4
Total women	23.2	25.7

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

Theater Going

In most types of small households, live theater attendance is more common than it is among the general populations used as benchmarks (Table 21). Women living alone are most likely to be theater goers; more than one out of five have attended live performances within the past year. To some extent, the above-average incidence of theater-going among people who live in small households reflects the high percentage of central city residents in this group. (See Table 7.)

Table 21

Percentage Reporting Live Theater Attendance
(in last twelve months)

	18-34 Years	35-64 Years
One-person household, male	16%	14%
One-person household, female	22	21
Two-person household, married	14	16
Two-person household, all other	17	16
Total men	11%	12%
Total women	12%	16%

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets

Moviegoing

For both small-household residents and the general population, moviegoing is a more widespread activity than theater going, and age appears to be more influential than household size where moviegoing is concerned. Regardless of household size, moviegoing is much more common among adults under 35 than among older adults. Reported movie attendance in the last 90 days tends to be average or above average for adults in small households; a major exception is two-person households consisting of a married couple (Table 22), who went far less often.

Table 22

Percentage Reporting Moviegoing
(in last 90 days)

	18-34 Years	35-64 Years
One-person household, male	44%	31%
One-person household, female	55	31
Two-person household, married	39	21
Two-person household, all other	51	29
Total men	42%	28%
Total women	45%	30%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

Foreign Travel

In the population at large, adults over age 35 are somewhat more likely to travel abroad than younger adults are (Table 23), whereas the reverse pattern tends to apply in small households. The highest percentage reporting foreign travel within the last three years is found among young women living alone and in two-person households consisting of young married couples.

Women living alone have smaller median incomes than men living alone (Table 11), but are more likely to travel abroad. This suggests that men and women who do not have the wishes of other household members to consider tend to spend their disposable income in different ways. In other words, more women than men find personal rewards in foreign travel.

Table 23

Reported Foreign Travel in Last Three Years

	18-34 Years	35-64 Years
One-person household, male	15%	13%
One-person household, female	20	17
Two-person household, married	20	19
Two-person household, all other	15	15
Total men	15%	18%
Total women	14%	17%

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets

Credit Card Ownership

Statistics on reported ownership of one or more credit cards show the same pattern found in a number of other tables in this report. That is, the figures for young women living alone and for married couples in two-person households are above the benchmark averages, while the figures for older men living alone and for "other" two-person households are below the averages (Table 24).

It might be argued that many of these data on consumption reflect the respondent's perception of his or her disposable income as much as any objective measure of income. If so, young women living alone and married couples in two-person households appear to feel more prosperous than other people in small households.

Table 24

Percentage Owning One or More Credit Cards

	18-34 Years	35-64 Years
One-person household, male	52%	55%
One-person household, female	63	61
Two-person household, married	67	69
Two-person household, all other	51	56
Total men	51%	65%
Total women	55%	66%

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets

Investments

Reported ownership of securities indicates that adults in small households generally follow the same kinds of investment strategies as the population at large (Table 25). Among adults who live alone, the percentage owning securities is slightly above average for those under 35 and below average for those who are 35 or older. Adults in two-person, married-couple households report the highest level of security ownership, while those in "other" types of two-person households show the lowest level.

Simmons figures on savings accounts and ownership of IRAs reveal a similar pattern (not shown in table).

Table 25

Percentage Reporting Ownership of Any Type Securities

	18-34 Years	35-64 Years
One-person household, male	24%	30%
One-person household, female	25	26
Two-person household, married	31	35
Two-person household, all other	19	25
Total men	22%	34%
Total women	22%	30%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

Alcoholic Beverages: Distilled Liquor

For the most part, reported consumption of distilled liquor, including gin, whiskey and vodka, is average or slightly above average among people in small households, as compared with the benchmark measures (Table 26). Women 35 or older who live alone are a notable exception; the proportion of this segment who drink distilled liquor is seven percentage points below the average for their age and sex.

Wine drinking patterns are similar, but on the whole, wine is somewhat more popular than distilled liquor among women, while the reverse is true for men (not shown in table).

Table 26

Percentage Drinking Any Distilled Liquor

	18-34 Years	35-64 Years
One-person household, male	61%	61%
One-person household, female	65	42
Two-person household, married	58	49
Two-person household, all other	62	48
Total men	57%	55%
Total women	56%	49%

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets

Implications of Chapter II

Even without a custom survey, syndicated research data on purchases, media usage and leisure activities can shed light on the nature of the small-household population under age 65. At the outset, it should be noted that differences among the eight types of small households analyzed can be more extreme than the difference between a given type of small household and the general population. In other words, it may be a mistake to think of adults in either one-person or two-person households as a single clearly defined market segment.

The available data cannot tell us how an individual *feels* about living in a small household, but it is possible to hazard some educated guesses that are consistent with the data. Here are some tentative conclusions about major factors that should be taken into account in order to understand the subsets within the small-household population:

One-person households, generational and life-stage differences

> It is reasonable to assume that, for most individuals, living alone represents a mixture of advantages and disadvantages . On the plus side, a major advantage might be *freedom*--the ability to do whatever one pleases without taking into account the wishes of other people. A major disadvantage might be *loneliness*--a feeling that one's relations with others are mostly superficial, that one has been abandoned by the people who really count, or perhaps even a sense of personal failure and unworthiness.

Men and women under 35 might be expected to put more emphasis on the positive aspects of living alone than older adults do, because many younger people have only recently escaped from parental controls. Also, younger adults may find it easier to form new attachments and to locate potential marriage partners.

Conversely, those who are 35 or older may be more vulnerable to the negatives of solitary living, especially since a large proportion have undergone separation, divorce or widowhood--experiences that amount to major life crises.

One-person households, sex differences

Solitary living can be expected to produce idiosyncratic spending patterns that accentuate sex differences. For example, men who live alone probably spend a larger portion of their income than men in larger households do on "typically" male interests.

Whether people have mostly positive or mostly negative feelings about living alone, men or women in one-person households enjoy considerable freedom from the wishes and demands of others. Therefore, living by oneself for an extended period of time might make one less conforming or more eccentric.

In the absence of the approval or disapproval of others, people living alone can be expected to follow their own predispositions. Those who are "naturally" extravagant may live far beyond their means, while those who tend to be frugal watch every penny.

Two-person households, married couples

Married couples in two-person households tend to be somewhat higher in socio-economic status than their total age cohort, but they are very much a part of the American mainstream. In fact, this group serves as a reminder that it is often more accurate to think of small households as a life-stage rather than a permanent condition. Many married couples live in two-person households only because they have not yet had children or because they have grown children who now have households of their own.

All other two-person households

In the aggregate, all other types of two-person households tend to be somewhat lower in socio-economic status than either men or women living alone, or married couples with no children at home. However, making generalizations about "other" two-person households would be misleading because this catch-all category includes so many kinds of combinations.

Newspaper readership in small households

In comparison to age and socio-economic class, living in a small household probably has relatively little influence on newspaper readership. This is especially true of Sunday newspaper readership among young adults.

Among adults over 35, living in a one- or two-person household (other than one consisting of a married couple) may appear to result in lower newspaper readership, but household size is probably less influential than other factors, such as the trauma of separation, divorce, widowhood or greater social isolation.

The most unexpected finding on daily newspaper readership involves adults under 35: In this group, average weekday coverage is lower in two-person households than in one-person households, a reversal of the pattern found in the total population. The reasons for this are unclear, but two-person, married couple households are also below average in TV viewing and moviegoing. Their more intense lifestyles and mobility rates may militate against stable levels of media use.

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FOOD SHOPPING, DINING OUT AND TAKE-OUT FOOD USE IN AMERICAN HOUSEHOLDS

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

January 1988

Newspaper Advertising Bureau, Inc.

CONTENTS

Page

HIGHLIGHTS 1

TABLES:

1. Food Shopping Habits: Store Selection 5
2. Percentage Switching Major Food Store in Past Two Years 6
3. Reason for Switching Major Food Store 7
4. Percentage Who Make a Shopping List Before Major Food Shopping Trip 8
5. Usual Source for Price Comparisons Between Food Stores 9
6. Percentage Recalling Supermarket or Food Ads in Daily Newspaper in Past Week 10
7. Average (Mean) Number of Trips per Week to Any Kind of Food Store 11
8. Frequency of Coupon Use 12
9. Sources for Food Coupons Used 13
10. Evening Meals: Average (Mean) Number of Times per Month Food Is Not Prepared at Home 14
11. Evening Meals: Eating Out and Use of Take-Out Food (Mean number of times per month, by type) 15
12. Distribution of Nutritional Attitudes, by Demographic Segments 16
13. Food Segmentation: Attitudes vs Behavior 17

APPENDIX:

DESCRIPTION OF RESEARCH 18

DESCRIPTION OF NPD's NUTRITIONAL SEGMENTATION CATEGORIES 19

RESPONDENT BASES 21

HIGHLIGHTS

A questionnaire on food shopping and dining out was mailed to a panel of 5,000 Home Testing Institute households in May 1987, producing 3,914 returns before the cutoff date. Tabulations show the following results:

On food shopping:

- o About half (48%) of all respondents reporting for their households say that they usually do their food shopping in one favorite store. A large minority (36%) regularly go to more than one store, and another 14% say that they usually shop in the store advertising the best specials. Among homemakers in households of five or more persons, 44% report going to more than one store. (Table 1)

- o While widespread patronage of a favorite food store implies a high level of store loyalty, more than one out of four respondents (27%) report that, within the past year or so, they have switched the store where they do most of their food shopping. Switching is most common where the head of the household is less than 30 years old. (Table 2)

- o The most common reason for switching (by 38%) is that a different store offered better value. Another 19% switched because a new store had opened. In households with heads under 30 years of age, moving (checked by 35%) is a common reason for switching stores. (Table 3)

HIGHLIGHTS (continued)

- Regardless of age, size of household or employment status, shoppers for more than eight out of ten (84%) of today's busy households make a shopping list before setting out on a major food shopping trip. (Table 4)

- Newspaper ads (checked by 55%) are the most popular source for price comparisons, followed by store circulars (37%) and prices in the stores themselves (28%). A minority (18%) indicate that they do not compare prices--a pattern somewhat more common among those who live alone (23%) and shoppers in households where the head is under 30 years of age (23%). (Table 5)

- The daily newspaper is a valuable, frequently consulted resource for food shoppers. In this survey, 88% of the respondents say that they recall seeing supermarket or food ads in the daily paper within the past week. (Table 6)

- On average, respondents report that major food shopping and fill-in shopping account for 2.4 trips per week. Demographics have limited influence on frequency of food shopping, but shoppers in households with five or more members tend to shop most often, averaging 2.8 trips per week. (Table 7)

HIGHLIGHTS (continued)

- o Cents-off coupons are widely used by food shoppers: 57% say that they "almost always" use them when they shop, as compared with only 6% who report that they "almost never" use them. The highest levels of coupon usage are found in the Northeast Census region and among food shoppers in large households with five or more members. (Table 8)

- o Food shoppers have several different sources for coupons, but nine out of ten (90%) get them from newspapers and newspaper inserts. Other sources include mailers and circulars (70%), magazines (58%), friends and relatives (27%), and the store itself (18%). (Table 9)

On take-out food and eating out:

- o Affluence and time pressures in two-wage-earner households are changing traditional shopping and eating patterns. On average, respondents estimate that about 30% of their evening meals (or about 9 meals per month) involve take-out food, eating out in a restaurant or dining out in the homes of friends or relatives. Deviations from the traditional practice of preparing food at home are especially common in households where the head is under 30 years of age and among people who live alone. (Table 10)

HIGHLIGHTS (concluded)

- All kinds of people patronize all kinds of eating places, but fast food outlets are most widely used by those under 45 years of age, while family restaurants are most popular with older adults. Patterns of eating out are similar throughout the United States, but fast food outlets are used somewhat more often in the South and Midwest than in the West and Northeast. (Table 11)

- Expressed attitudes toward food vary considerably. All four of the "nutritional segmentation" categories[1] developed by the NPD Group are found in all demographic segments, but in varying proportions. Both "conventional tastes" and "nutritionally fit" attitudes are most common in households where the head is less than 30 years old. "Restrictive dieter" attitudes are most likely to be found in households where the head is 65 years of age or older. (Table 12)

- Where eating behavior is concerned, 34% of the households in this sample are classified as "sophisticates", as compared with only 11% that are "meat 'n potatoes" households.[1] Respondents don't always practice what they preach, but there is some relationship between nutritional attitudes and types of foods consumed. For example, 39% of those with "restrictive dieter" attitudes are classified as "diet conscientious". (Table 13)

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1) See Appendix for description of categories.

Table 1

Food Shopping Habits: Store Selection

	Usually Shop At:		
	One Favorite Store	More Than One Store	Store Advertising Best Specials
Total respondents	48%	36%	14%
Age of household head:			
Under 30 years	56%	30%	10%
30-44 years	51	37	10
45-64 years	48	37	13
65 years or older	43	34	20
Census region:			
Northeast	51%	34%	13%
Midwest	46	36	16
South	48	37	13
West	46	36	15
Household size:			
One person	50%	33%	14%
Two persons	46	35	16
Three-four persons	51	36	12
Five or more persons	41	44	14
Employment status of female head:			
Employed	51%	34%	12%
Not employed	45	36	17

Question: Which statement best describes your food shopping habits? ("X" ONE ONLY)

I have one favorite store where I usually shop
I regularly go to more than one store
I usually go to the store that advertises the best specials
I choose the store I shop in on the spur of the moment

Note: Rows do not total 100% because "spur of the moment" responses have been excluded (less than 2% of total responses). Bases for all demographic segments are shown in Appendix.

Table 2

Percentage Switching Major Food Store in Past Two Years

	Percent
Total respondents	27%
Age of household head:	
Under 30 years	39%
30-44 years	33
45-64 years	25
65 years or older	18
Region:	
Northeast	24%
Midwest	23
South	31
West	28
Size of household:	
One person	23%
Two persons	27
Three-four persons	28
Five or more persons	29
Employment status of female head:	
Employed	29%
Not employed	22

Question: In the past year or so, have you switched the store where you do most of your food shopping?

Note: Bases for all demographic segments are shown in the Appendix.

Table 3

Reason for Switching Major Food Store

	Different Store Had Better Value	New Store Opened	Moved	Got Tired of Old Store
Total switching	38%	19%	18%	5%
Age of household head:				
Under 30 years	29%	10%	35%	4%
30-44 years	37	19	20	5
45-64 years	38	24	11	6
65 years or older	45	16	13	5
Census region:				
Northeast	38%	16%	19%	5%
Midwest	39	17	19	5
South	38	23	17	4
West	34	18	19	6
Size of Household:				
One person	37%	15%	27%	4%
Two persons	35	20	18	7
Three-four persons	37	21	15	4
Five or more persons	48	17	9	3
Employment status of female head:				
Employed	34%	20%	18%	6%
Not employed	44	17	13	5

Question: What was your main reason for switching stores?

I moved..................( )
A new store opened........( )
Got tired of my old store.( )

A different store
offered better value.....( )
Changed job locations......( )
Some other reason..........( )

Note: Rows do not total 100% because "changed job location" (3% of total) and "some other reason" (20% of total) have been excluded. Bases for all demographic segments are shown in Appendix.

Table 4

Percentage Who Make A Shopping List Before Major Food Shopping Trip

	Percent
Total respondents	84%
Age of household head:	
Under 30 years	84%
30-44 years	80
45-64 years	84
65 years or older	87
Census region:	
Northeast	83%
Midwest	86
South	82
West	84
Size of household:	
One person	82%
Two persons	85
Three-four persons	84
Five or more person	81
Employment status of female head:	
Employed	81%
Not employed	88

Question: Before going on a major food shopping trip, do you usually make a shopping list?

Note: Bases for all demographic segments are shown in Appendix.

Table 5

Usual Source for Price Comparisons Between Food Stores

	Newspaper Ads	Store Circulars	Prices in Stores	Don't Compare
Total respondents	55%	37%	28%	18%
Age of household head:				
Under 30 years	39%	25%	33%	23%
30-44 years	50	31	33	20
45-64 years	59	40	27	17
65 years or older	59	43	21	15
Census region:				
Northeast	46%	45%	24%	21%
Midwest	56	37	27	16
South	57	33	32	16
West	59	30	27	19
Size of household:				
One person	49%	36%	24%	23%
Two persons	56	38	27	16
Three-four persons	56	35	28	18
Five or more persons	57	41	36	11
Employment status of female head:				
Employed	52%	33%	27%	21%
Not employed	60	41	26	14

Question: How do you usually go about comparing prices between food stores?

Look at newspaper ads..( )
Look at TV ads........( )
Read store circulars...( )
Check prices in stores..........( )
Some other way.................( )
I do not compare store prices...( )

Note: Rows total more than 100% because of multiple mentions. "Some other way" (1% of total) and "Look at TV ads" (3% of total) have been excluded from table. Bases for all demographic segments are shown in Appendix.

Table 6

Percentage Recalling Supermarket or Food Ads In Daily Newspaper in Past Week

	Percentage
Total respondents	88%
Age of household head:	
Under 30 years	79%
30-44 years	86
45-64 years	91
65 years or older	91
Census region:	
Northeast	87%
Midwest	89
South	89
West	87
Size of household:	
One person	86%
Two persons	89
Three-four persons	89
Five or more persons	90
Employment status of female head:	
Employed	88%
Not employed	90

Question: During the past week, do you recall seeing any supermarket or other food ads in a daily newspaper?

Note: Bases for all demographic segments are shown in Appendix.

Table 7

Average (Mean) Number of Trips per Week to Any Kind of Food Store

	Trips per Week
Total respondents	**2.4**
Age of household head:	
Under 30 years	2.4
30-44 years	2.5
45-64 years	2.5
65 years or older	2.1
Census region:	
Northeast	2.6
Midwest	2.3
South	2.4
West	2.3
Size of household:	
One person	2.2
Two persons	2.3
Three-four persons	2.5
Five or more persons	2.8
Employment status of female head:	
Employed	2.4
Not employed	2.3

Question: Counting both major food shopping and fill-in shopping, about how many trips per week do you make to any kind of food store (including supermarkets, convenience stores, health food stores, etc.)?

Note: Bases for all demographic segments are shown in Appendix.

Table 8

Frequency of Coupon Use

	Almost Always	About Half The Time	Once in A While	Almost Never
Total respondents	57%	17%	20%	6%
Age of household head:				
Under 30 years	58%	16%	20%	6%
30-44 years	59	19	16	6
45-64 years	54	18	20	6
65 years or older	54	17	22	6
Census region:				
Northeast	68%	13%	15%	4%
Midwest	58	20	17	4
South	50	21	22	7
West	45	18	26	9
Size of Household:				
One person	44%	18%	26%	10%
Two persons	58	17	20	4
Three-four persons	60	19	15	5
Five or more persons	63	17	16	4
Employment status of female head:				
Employed	56%	19%	19%	6%
Not employed	58	17	19	5

Question: How often do you use coupons when you shop?

Almost always...........( )   Once in a while.......( )
About half the time.....( )   Almost never..........( )

Note: Rows do not total 100% because "no answers" have been excluded. Bases for all demographic segments are shown in the Appendix.

Table 9

Sources for Food Coupons Used

	Newspaper Ad, Insert	Mailer, Circular	Magazine	Friend, Relative	Store
Total respondents	90%	70%	58%	27%	18%
Age of household head:					
Under 30 years	89%	73%	64%	43%	26%
30-44 years	92	75	64	38	24
45-64 years	90	74	58	24	17
65 years or older	88	59	50	15	11
Census region:					
Northeast	91%	75%	58%	31%	21%
Midwest	92	71	62	31	24
South	90	67	58	24	12
West	85	67	52	20	13
Size of household:					
One person	86%	64%	48%	18%	12%
Two persons	91	67	57	25	16
Three-four persons	91	75	65	34	21
Five or more persons	93	79	64	36	28
Employment status of female head:					
Employed	91%	75%	63%	31%	20%
Not employed	90	67	57	25	15

Question: When you use coupons, where do you get them?

Newspaper or newspaper inserts..( )	Mailer or circular.......( )
Magazine.......................( )	In the store.............( )
From a friend or relative.......( )	Other....................( )

Note: Rows total more than 100% because of multiple mentions. "Other" responses have been excluded (4% of total). Bases for all demographic segments are shown in Appendix.

Table 10

Evening Meals: Average (Mean) Number of Times per Month Food is Not Prepared at Home

	Average Number of Times
Total respondents	8.9
Age of household head:	
Under 30 years	10.9
30-44 years	9.0
45-64 years	8.5
65 years or older	8.2
Census region:	
Northeast	8.5
Midwest	9.4
South	9.1
West	8.3
Size of household:	
One person	10.4
Two persons	8.9
Three-four persons	8.4
Five or more persons	7.2
Employment status of female head:	
Employed	9.3
Not employed	7.4

Question: For your evening meal, about how many times per month do you do the following, either alone or with your family?

Eat at or take out from a fast food burger place
Eat at or take out from other type of fast food place
Eat out in a family restaurant
Dine out in a fine restaurant with full service
Dine out at someone else's home

Note: Figures shown in table are totals of five individual means shown in Table 11. Bases for all demographic segments are shown in Appendix.

Table 11

Evening Meals: Eating Out and Use of Take-Out Food
(Mean number of times per month, by type)

	Average Number of Times:				
	Fast Food, Burger	Fast Food, Other	Family Rest.	Full Serv. Rest.	Someone Else's Home
Total respondents	2.2	2.0	2.2	1.2	1.3
Age of household head:					
Under 30 years	3.4	3.0	1.7	1.1	1.7
30-44 years	2.6	2.4	1.7	1.0	1.3
45-64 years	1.9	1.7	2.4	1.4	1.1
65 years or older	1.6	1.3	2.7	1.3	1.3
Census region:					
Northeast	1.8	1.9	2.1	1.3	1.4
Midwest	2.5	2.2	2.3	1.2	1.2
South	2.4	2.1	2.0	1.3	1.3
West	1.9	1.8	2.2	1.2	1.2
Size of household:					
One person	2.2	2.1	2.6	1.7	1.8
Two persons	2.1	1.9	2.4	1.3	1.2
Three-four persons	2.3	2.0	2.0	1.0	1.1
Five persons	2.3	2.0	1.3	0.7	0.9
Employment status of female head:					
Employed	2.4	2.2	2.2	1.3	1.2
Not employed	1.7	1.5	2.1	1.0	1.1

Question: For your evening meal, about how many times per month do you do the following, either alone or with your family?

Eat at or take out from a fast food burger place
Eat at or take out from other type of fast food place
Eat out in a family restaurant
Dine out in a fine restaurant with full service
Dine out at someone else's home

Note: Bases for all demographic segments are shown in Appendix.

Table 12

Distribution of Nutritional Attitudes, By Demographic Segments

	Attitudes: Nutritionally Fit	Conventional Tastes	Busy Urbanite	Restrictive Dieter
Total respondents	26%	24%	30%	20%
Age of household head:				
Under 30 years	30%	35%	25%	10%
30-44 years	29	29	30	12
45-64 years	24	22	32	22
65 years of older	22	20	29	29
Census region				
Northeast	23%	24%	34%	19%
Midwest	26	27	25	22
South	25	25	29	21
West	28	19	35	18
Household size:				
One person	22%	22%	38%	18%
Two persons	25	20	30	25
Three-four persons	27	28	28	17
Five or more persons	30	32	18	20
Employment status of female head:				
Employed	29%	25%	30%	16%
Not employed	23	24	25	28

Note: Segmentation of nutritional attitudes is based on a cluster analysis of proprietary questions developed by the NPD group. See Appendix for description of categories.

Table 13

Food Segmentation: Attitudes vs Behavior

	Total Respondents
Naturalists	22%
Meat 'n potatoes	11
Sophisticates	34
Diet conscientious	25
Kids around	8

	Attitudes:			
	Nutritionally Fit	Conventional Tastes	Busy Urbanite	Restrictive Dieter
Total households	26%	24%	30%	20%
Behavior:				
Naturalists	36	11	21	19
Meat 'n potatoes	4	25	7	11
Sophisticates	28	39	43	23
Diet conscientious	26	13	23	39
Kids around	6	12	6	8
Bases:	(868)	(834)	(1033)	(693)

Note: Segmentation of nutritional attitudes and eating behavior is based on a cluster analysis of proprietary questions developed by the NPD Group. See Appendix for descriptions.

APPENDIX

DESCRIPTION OF RESEARCH

Newspaper Advertising Bureau commissioned this research in order to update information on food shopping issues, including store loyalty, store switching, use of a shopping list, number of food shopping trips per week, sources for price comparisons and coupons, and patronage of restaurants and fast food outlets. Home Testing Institute of the NPD Group provided additional information on nutritional attitudes and behavior.

Home Testing Institute diary panel members are carefully instructed in responding for their households. In some respects, then, the data are collected from households rather than individuals, and in fact, the HTI panels are balanced on household characteristics.

During the first week of May 1987, Home Testing Institute fielded a self-administered Insta-Vue Questionnaire to 5,000 nationally representative households previously coded on the basis of their nutritional attitudes and behavior. When the study was closed for tabulation on May 26, 1987, 3,9[illegible]4 completed questionnaires had been received, for a response rate of 78%.

Newspaper Advertising Bureau, Inc., developed the questionnaire, commissioned the field work and analyzed the data. This report was written by Charles Lehman of NAB's Research Department.

DESCRIPTION OF NPD's NUTRITIONAL SEGMENTATION CATEGORIES

Attitudinal Segments

"Nutritionally Fit"

"Nutritionally Fit" households are into exercise and watch carefully what they eat. They are more concerned with nutritional issues than with taste or convenience. Nutritionally Fit households are the ones who read the cereal ingredients listed on the box at the store. They have a lifestyle best characterized as inner-directed and tend to be younger, upscale families .

"Conventional Tastes"

"Conventional Tastes" households are almost the complete opposite of "Nutritionally Fit" households. They are more concerned about the taste of food than its nutritional content. "Conventional Tastes" households tend to be younger, lower income families with two, three or more children.

"Busy Urbanites"

The "Busy Urbanite" households are convenience-oriented. They tend to "graze" throughout the day. Busy Urbanites are more likely to eat away from home than households in other attitudinal groups. They tend to be affluent singles and young married professionals. The household tends to be very inner-directed, driven by goals which focus on personal and professional success.

"Restrictive Dieters"

"Restrictive Dieters" are not necessarily on a weight-loss program; they simply watch what they eat. They count calories, watch their salt and cholesterol intake, and are likely to be on doctor-prescribed dietary programs. The Restrictive Dieters are the most downscale attitudinal group. These households tend to have very low incomes, older female heads, members who have a high school education or less, and no one in the work force.

Behavioral Segments

"Naturalists"

"Naturalists" households prefer foods which are either good for them or positioned as good for them. They display an above average consumption of "health" foods like natural cereals, wheat germ, yogurt, fresh fruit, bran fiber bread and granola bars.

"Meat 'n Potatoes"

The "Meat 'n Potatoes" segment is a very traditional blue collar family. The healthfulness of foods does not appear to be an important issue to these households. They are characterized by above average consumption of "all-American" foods: roast beef, roast pork, potatoes, gravy, pies and whole milk.

"Sophisticates"

The most upscale behavioral group, the "Sophisticates" have a varied diet. At most times, they behave as "Naturalists". However, they are more likely than Naturalists to indulge themselves in adult-oriented foods. They may spend a great deal of their valuable time preparing a meal, but on occasion they will cook a gourmet frozen dinner in the microwave or go out to dinner. Foods they consume on an above average basis include wine, cocktails and beer; Swiss cheese; rye/pumpernickel bread; bagels; and butter.

"Diet Conscientious"

The "Diet Conscientious" are frequent users of diet or "low calorie" products and are likely to be on a doctor-prescribed diet. Their consumption of traditional diet foods is above average: skim milk, diet margarine, sugar substitutes, salads and fresh fruits.

"Kids Around"

Somewhat more upscale than the "Meat 'n Potatoes" household, the large family "Kids Around" group appears to cater to their children's food and beverage preferences. Their diets are filled with inexpensive and non-nutritious foods like pre-sweetened cereals, soft drinks, pizza, spaghetti, hot dogs and bologna sandwiches.

RESPONDENT BASES

	Total Number	Total Switching Food Stores
Total respondents	3,914	1,042
Age of household head:		
Under 30 years	363	140
30-44 years	1,152	380
45-64 years	1,304	321
65 years or older	1,095	201
Census region:		
Northeast	947	231
Midwest	1,142	260
South	1,153	361
West	670	189
Household size:		
One person	948	219
Two persons	1,295	346
Three-four persons	1,241	351
Five or more persons	430	126
Employment status of female head:[a]		
Employed	1,539	449
Not employed	1,453	322

(All bases shown are unweighted.)

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a) Data on employment status of female head are based on respondents for whom nutritional segmentation figures were available (N = 3,428).

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INVESTORS LOOK AHEAD:

A study of Financial Alternatives

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INVESTORS LOOK AHEAD:

A Study of Financial Alternatives

February 1988

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CONTENTS

Page

EXECUTIVE SUMMARY.. 1

MARKETING IMPLICATIONS..................................... 3

TABLES:

1. How often do you worry about your future financial security?. 4
2. Current Need for Advice on Money Management and Investments.. 5
3. Self-Rating on Knowledge of Stocks, Bonds and Mutual Funds... 6
4. First Choice for Financial Consultant........................ 7
5. Medium with Best Information on Stocks, Bonds and Mutual Funds........................ 8
6. Similarity/Difference Among Stock Brokerage Firms........... 9
7. Percentage Having Account with Stock Broekerage Firm or Mutual Fund..................... 10
8. Firm Respondent Has an Account With......................... 11
9. Reason for Choosing Brokerage Firm or Mutual Fund........... 12
10. Within the past 12 months, have you considered changing to some other firm?............................. 13
11. Reported Ownership of Stocks, Bonds or Mutual Funds.......... 14
12. Expected Change in Stock and Bond Holdings Over Coming Year.. 15
13. Identification of Companies Using Advertising Slogans........ 16

METHODOLOGY.. 17

EXECUTIVE SUMMARY

- Future financial security is often on the minds of many contemporary Americans. As measured by a ten-point scale, one out of four (26%) indicate that they worry about this "constantly", compared with only 8% who say that they "never" worry about it. The intensity of concern is somewhat lower among the affluent and the well-educated, but even in these groups the majority imply that they spend as much as half their time worrying about financial security. (Table 1)

- In spite of their evident concerns about financial security, a sizable minority (23%) indicate that they "don't need any" advice on money management or investments. This group may include both people who feel that they don't have any money to manage and others who doubt the availability of objective information on money management and investments. (Table 2)

- Most respondents characterize their personal knowledge of stocks, bonds and mutual funds as very limited. On a scale from 1 (not at all familiar) to 10 (very familiar), 55% give themselves a rating of "3" or lower. Among those with family incomes of $75,000 and over, only 24% give themselves such a low rating. (Table 3)

- A typical American does not appear to think of stockbrokers or mutual fund representatives as reliable financial advisers. When asked what kind of person would be their first choice for a financial consultant, 36% selected "bank officer" and 23%, "a friend or relative". The proportion choosing "stockbroker" was 12%, while 15% chose "mutual fund salesman." (Table 4)

  "Stockbroker" may be the first choice at the highest family income level ($75,000 and over), but this finding is tentative because the sample base for this group is small. (Table 4)

- The daily newspaper is widely perceived as the source for the most useful and complete information on stocks, bonds and mutual funds. When asked about the four major media in this context, nearly half of the sample (49%) chose daily newspapers, compared with 22% choosing television, 20% magazines, and 3% radio. (Table 5)

  Among the affluent and the well-educated, an even higher proportion names daily newspapers as the best source for financial information. Magazines rather than television rank second with upscale groups. (Table 5)

- Respondents are split on whether "all (stock brokerage firms) are just alike" or "very different from one another". 24% of the respondents declined to offer any opinion on this issue. (Table 6)

EXECUTIVE SUMMARY (Continued)

- About one-fourth (24%) of the respondents report that they currently have an account with a stock brokerage firm or mutual fund. This proportion is about the same for men and women, but steadily increases in higher family income brackets, from 42% of those with incomes between $40,000 and $50,000, to 65% of those with incomes of $75,000 and over. (Table 7; Table 8 shows firms named.)

- The response to prelisted statements about the selection of their brokerage firm or mutual fund indicates that personal recommendations are the most influential factor. More than four out of ten who currently have accounts (43%) say "someone personally recommended" the firm they now use. Another 18% mention the firm's "great reputation", while 10% said they were personally contacted by a broker, and 10% wanted a "large" firm. (Table 9)

- For the most part, brokerage and mutual fund clients appear to be satisfied with their current firms, but nearly one out of five (18%) report that they have considered changing to some other firm within the past twelve months. Those with incomes of $75,000 and over may be somewhat less loyal than other clients. (Table 10)

- The percentage reporting ownership of stocks, bonds and mutual funds shows hardly any difference between "a year ago" and "today". Overall, there is a marginal drop in the percentage owning securities; only one of the key demographic segments (family income of $50,000 to $75,000) claims a higher level of ownership now than a year ago. (Table 11)

- Over the coming year, a majority of respondents (55%) expect that their holdings in stocks and bonds will remain "about the same". Three out of ten (31%) believe that their holdings will increase, while 6% anticipate a decrease in their holdings. (Table 12)

  Optimism is more prevalent in the higher income brackets, and among those who currently have accounts with a stock brokerage firm or mutual fund. However, this last group is also somewhat more likely to believe that their holdings will decrease, mainly because they are less inclined to expect that their personal stake in the financial markets will "stay about the same". (Table 12)

- Public awareness of three heavily promoted financial slogans is limited. One out of four adults (25%) correctly name Merrill Lynch as the company using, "We're bullish on America", while 13% recognize the Prudential-Bache slogan, and 11%, the Smith Barney slogan. The level of recognition tends to be higher among upscale demographic segments. (Table 13)

MARKETING IMPLICATIONS

The implications of this survey will vary with the management policies, marketing objectives and product mix of particular financial services companies. However, these general observations may be relevant for a broad spectrum of financial advertisers:

1) Trend lines cannot be developed on the basis of a survey taken at a single point in time. Nevertheless, the attitudes expressed in this survey, viewed against recent developments in financial markets, suggest that some lowering of financial expectations may have occurred since "Black Monday". There is no evidence of panic, but there seems to be wider recognition than before that stocks can fall as well as rise.

   If this assumption is correct, individual investors may now be more inclined to favor slow growth or guaranteed returns over high-risk, high-reward investments.

2) The inconsistent pattern of responses found in this survey suggests that many members of the public are experiencing conflict and confusion about money management. A majority appears to perceive most current advertising for financial service companies as sales efforts that have little to do with their own lives or personal needs.

   A materialistic culture, easy credit and heavy advertising pressure encourage American consumers to want it all now. This coalescence of influences has led to the lowest personal savings and investment rate in the developed world. At the same time, many Americans would like the feeling of security that comes from being "rich".

   In fact, financial service companies are competing not only with one another but also with other marketers of goods and services. Perhaps it is time to promote savings and investment not merely as a source of funds for specific types of consumption, but as a rewarding end in itself, that can lead to a general sense of being financially secure.

3) As the medium that brings investors detailed information about the world and the community, as well as financial markets, the daily newspaper is a logical choice for promoting the advantages of a long-term investment program.

Table 1

How often do you worry about your future financial security?

		*---SEX----	-*	*AGE-*	*----INCOME----		-----*		
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
CONSTANTLY (10)	258 25.8%	116 24.4%	142 27.1%	118 27.3%	20 19.0%	15 13.8%	6 12.0%	23 10.5%	48 19.7%
(9)	39 3.9%	27 5.6%	12 2.4%	16 3.7%	6 5.3%	3 2.5%	2 3.8%	8 3.8%	11 4.5%
(8)	114 11.4%	57 11.9%	57 11.0%	51 11.8%	10 9.8%	7 6.8%	8 17.4%	28 12.7%	29 12.1%
(7)	75 7.5%	43 9.1%	32 6.1%	25 5.7%	14 12.8%	13 12.2%	5 11.6%	18 8.3%	20 8.1%
(6)	71 7.1%	30 6.2%	42 8.0%	31 7.1%	11 10.5%	11 10.1%	4 9.2%	28 12.9%	22 9.2%
(5)	202 20.2%	83 17.5%	119 22.7%	90 20.8%	31 29.3%	21 19.4%	7 15.3%	49 22.7%	47 19.3%
(4)	45 4.5%	24 5.1%	20 3.9%	23 5.4%	1 .5%	7 6.3%	5 10.9%	14 6.6%	12 4.8%
(3)	63 6.3%	30 6.3%	33 6.3%	27 6.1%	5 4.6%	15 14.5%	5 11.1%	23 10.5%	26 10.6%
(2)	38 3.8%	18 3.8%	20 3.7%	13 3.0%	1 .7%	6 5.9%	2 5.0%	9 4.1%	6 2.6%
(1) NEVER	80 8.0%	40 8.3%	41 7.7%	36 8.3%	8 7.4%	9 8.6%	2 3.7%	16 7.6%	22 9.1%
DON'T KNOW/NO ANSWER	15 1.5%	8 1.8%	7 1.2%	3 .7%	-	-	-	1 .4%	-
TOTAL WEIGHTED RESPONDENTS	1000 100.0%	477 100.0%	524 100.1%	433 99.9%	107 99.9%	106 100.1%	47 100.0%	216 100.1%	243 100.0%
MEAN	6.4	6.4	6.4	6.5	6.4	5.5	6.0	5.7	6.1
STD DEV	2.91	2.92	2.90	2.93	2.56	2.71	2.52	2.55	2.85

Question: On a scale from one to ten, with one meaning "never" and ten meaning "constantly", how often do you worry about your future financial security?

Table 2

Current Need for Advice on Money Management and Investments

		*---SEX----	*	*AGE-*	*-----INCOME		-----*		
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
NEED A GREAT DEAL MORE	211	95	117	74	7	14	3	16	23
(10)	21.1%	19.9%	22.3%	17.1%	6.3%	13.3%	7.0%	7.3%	9.5%
(9)	17	8	10	8	3	3	1	5	6
	1.7%	1.6%	1.8%	1.8%	2.7%	2.6%	1.9%	2.2%	2.6%
(8)	46	17	28	18	5	4	3	15	13
	4.6%	3.6%	5.4%	4.1%	4.9%	3.8%	6.8%	7.0%	5.5%
(7)	60	37	23	19	10	12	5	18	16
	6.0%	7.8%	4.4%	4.3%	9.8%	11.3%	10.6%	8.2%	6.6%
(6)	41	25	16	17	5	4	2	11	13
	4.1%	5.2%	3.1%	3.8%	4.3%	3.5%	3.6%	5.3%	5.4%
(5)	174	80	93	86	29	21	8	45	53
	17.4%	16.9%	17.8%	19.8%	27.5%	19.9%	16.2%	20.6%	21.8%
(4)	68	31	36	27	7	6	4	15	17
	6.8%	6.6%	6.9%	6.1%	6.8%	6.0%	7.8%	7.1%	6.9%
(3)	84	50	34	39	11	16	4	26	28
	8.4%	10.4%	6.5%	9.0%	10.0%	14.8%	9.4%	12.1%	11.6%
(2)	48	24	24	20	4	2	5	14	11
	4.8%	5.1%	4.7%	4.6%	3.7%	1.9%	10.5%	6.6%	4.6%
(1)	233	102	130	121	22	24	12	50	61
DON'T NEED ANY	23.3%	21.5%	24.9%	28.0%	20.9%	23.0%	26.2%	23.2%	25.0%
DON'T KNOW/NO ANSWER	18	7	11	5	3	-	-	1	2
	1.8%	1.4%	2.1%	1.2%	3.1%			.4%	.6%
TOTAL WEIGHTED	1000	477	524	433	107	106	47	216	243
RESPONDENTS	100.0%	100.0%	99.9%	99.8%	100.0%	100.1%	100.0%	100.0%	100.1%
MEAN	5.1	5.1	5.1	4.7	4.6	4.8	4.3	4.4	4.5
STD DEV	3.31	3.23	3.39	3.23	2.65	3.00	2.85	2.78	2.88

Question: On a scale from one to ten, with one meaning "don't need any" and ten meaning "need a great deal more", how would you describe your current needs for advice on money management and investments?

Table 3

Self-Rating on Knowledge of Stocks, Bonds and Mutual Funds

		*---SEX-----	**AGE-**	-----INCOME-----		-----*			
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
VERY FAMILIAR	27	14	13	10	1	4	5	8	17
(10)	2.7%	3.0%	2.5%	2.4%	1.2%	4.0%	11.7%	3.8%	7.2%
(9)	14	10	4	7	2	3	3	8	6
	1.4%	2.0%	.8%	1.6%	1.8%	2.5%	5.5%	3.5%	2.6%
(8)	46	24	22	19	11	11	8	26	21
	4.6%	5.1%	4.1%	4.5%	10.3%	10.2%	16.9%	11.9%	8.8%
(7)	51	30	21	24	8	9	4	26	27
	5.1%	6.2%	4.0%	5.5%	7.2%	8.3%	8.9%	12.2%	11.0%
(6)	47	25	22	27	10	7	3	17	25
	4.7%	5.1%	4.2%	6.2%	8.9%	6.2%	6.3%	7.9%	10.1%
(5)	149	91	58	82	17	22	8	41	49
	14.9%	19.1%	11.1%	19.0%	15.4%	21.3%	17.4%	19.1%	20.1%
(4)	94	44	51	34	15	14	3	14	19
	9.4%	9.2%	9.7%	7.8%	13.7%	13.0%	7.1%	6.5%	7.9%
(3)	126	62	64	48	13	14	5	28	35
	12.6%	13.1%	12.2%	11.1%	12.0%	12.9%	11.1%	13.0%	14.5%
(2)	96	37	59	42	15	12	1	29	11
	9.6%	7.8%	11.3%	9.7%	14.3%	11.4%	3.1%	13.2%	4.6%
(1)	326	132	194	128	16	11	5	18	31
NOT AT ALL FAMILIAR	32.6%	27.8%	37.1%	29.6%	15.1%	10.3%	10.1%	8.5%	12.9%
DON'T KNOW/NO ANSWER	23	7	16	11	-	-	1	1	1
	2.3%	1.6%	3.0%	2.6%			2.1%	.4%	.4%
TOTAL WEIGHTED	1000	477	524	433	107	106	47	216	243
RESPONDENTS	99.9%	100.0%	100.0%	100.0%	99.9%	100.1%	100.2%	100.0%	100.1%
MEAN	3.5	3.8	3.2	3.7	4.3	4.7	5.8	5.0	5.0
STD DEV	2.49	2.52	2.41	2.47	2.38	2.43	2.77	2.51	2.58

Question: On a scale from one to ten, with one meaning "not at all familiar" and ten meaning "very familiar", how would you describe your personal knowledge about stocks, bonds and mutual funds?

Table 4

First Choice for Financial Consultant

		SEX		AGE	INCOME				
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
A BANK OFFICER	360 36.0%	171 35.9%	189 36.1%	167 38.6%	36 33.5%	22 21.1%	7 15.6%	57 26.1%	67 27.6%
A LIFE INSURANCE SALESMAN	41 4.1%	21 4.4%	20 3.8%	13 3.0%	5 4.8%	8 7.8%	-	3 1.4%	10 4.1%
A STOCKBROKER	122 12.2%	57 12.0%	65 12.4%	51 11.8%	13 11.8%	15 14.3%	10 22.3%	31 14.2%	46 18.8%
A MUTUAL FUND SALESMAN	154 15.4%	86 18.0%	68 13.1%	71 16.5%	18 16.8%	28 26.2%	8 17.8%	42 19.4%	50 20.7%
A FRIEND/RELATIVE	231 23.1%	92 19.3%	139 26.5%	72 16.5%	17 15.7%	21 20.2%	10 21.9%	52 24.0%	40 16.4%
NONE/DON'T NEED ADVICE	87 8.7%	47 9.8%	40 7.7%	56 12.9%	19 17.4%	11 10.4%	9 20.2%	32 14.9%	28 11.7%
DON'T KNOW/NO ANSWER	4 .4%	3 .6%	1 .3%	3 .7%	-	-	1 2.2%	-	2 .6%
TOTAL WEIGHTED RESPONDENTS	1000 99.9%	477 100.0%	524 99.9%	433 100.0%	107 100.0%	106 100.0%	47 100.0%	216 100.0%	243 99.9%

Question: Suppose that you won $100,000, along with a free consultation on how to make the best use of that money. Which one of the following kinds of people would be your first choice for a consultant? (READ RANDOMIZED LIST, AS SHOWN IN TABLE)

Table 5

Medium with Best Information on Stocks, Bonds and Mutual Funds

		SEX		AGE	INCOME				
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
RADIO	28 2.8%	18 3.9%	10 1.8%	9 2.0%	1 1.2%	-	1 2.1%	5 2.3%	7 2.8%
TELEVISION	224 22.4%	97 20.3%	128 24.4%	106 24.4%	18 16.5%	14 13.7%	5 11.3%	22 10.0%	40 16.6%
MAGAZINES	198 19.8%	92 19.2%	106 20.2%	84 19.4%	23 21.5%	19 18.2%	14 30.6%	55 25.4%	54 22.3%
DAILY NEWSPAPERS	485 48.5%	235 49.3%	250 47.7%	208 48.0%	58 54.5%	64 60.7%	25 54.0%	121 55.9%	130 53.4%
NONE OF THE ABOVE	45 4.5%	19 4.1%	25 4.8%	21 4.9%	3 3.2%	8 7.4%	1 2.0%	10 4.8%	12 4.8%
DON'T KNOW/NO ANSWER	20 2.0%	15 3.2%	5 1.0%	5 1.1%	3 2.9%	-	-	3 1.5%	-
TOTAL WEIGHTED RESPONDENTS	1000 100.0%	477 100.0%	524 99.9%	433 99.8%	107 99.8%	106 100.0%	47 100.0%	216 99.9%	243 99.9%

Question: And which medium would you say gives the most useful and complete information about stocks, bonds and mutual funds? (READ RANDOMIZED LIST)

Table 6

Similarity/Difference Among Stock Brokerage Firms

		SEX		AGE	INCOME				
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
VERY DIFFERENT (10)	101 10.1%	46 9.7%	55 10.4%	37 8.5%	7 6.8%	12 11.5%	6 12.9%	14 6.5%	22 9.2%
(9)	4 .4%	2 .4%	2 .4%	3 .7%	-	-	-	1 .4%	1 .6%
(8)	44 4.4%	17 3.5%	27 5.2%	20 4.7%	7 6.9%	8 7.2%	2 3.3%	15 6.9%	18 7.3%
(7)	45 4.5%	32 6.7%	13 2.4%	16 3.7%	10 9.7%	6 5.6%	2 4.7%	8 3.7%	15 6.0%
(6)	40 4.0%	20 4.2%	20 3.8%	17 3.9%	1 .5%	3 2.6%	4 7.7%	9 4.0%	16 6.7%
(5)	184 18.4%	81 16.9%	104 19.8%	85 19.6%	28 26.1%	16 15.4%	10 21.1%	45 20.6%	51 21.1%
(4)	48 4.8%	25 5.2%	23 4.4%	22 5.1%	3 3.0%	8 7.6%	3 7.1%	19 8.9%	14 5.9%
(3)	69 6.9%	39 8.2%	30 5.8%	31 7.1%	6 5.6%	17 16.0%	6 11.8%	38 17.7%	25 10.3%
(2)	35 3.5%	20 4.1%	15 2.9%	20 4.7%	6 6.0%	7 6.4%	3 7.2%	13 6.2%	11 4.4%
(1) ALL ALIKE	189 18.9%	97 20.3%	92 17.5%	92 21.3%	22 20.3%	14 13.3%	10 22.1%	35 16.2%	37 15.2%
DON'T KNOW/NO ANSWER	242 24.2%	99 20.8%	143 27.3%	89 20.7%	16 15.2%	15 14.4%	1 2.1%	19 8.9%	32 13.3%
TOTAL WEIGHTED RESPONDENTS	1000 100.1%	477 100.0%	524 99.9%	433 100.0%	107 100.1%	106 100.0%	47 100.0%	216 100.0%	243 100.0%
MEAN	4.6	4.5	4.8	4.4	4.5	4.8	4.5	4.3	4.9
STD DEV	2.98	2.96	3.00	2.90	2.78	2.88	2.90	2.57	2.76

Question: On a scale from one to ten, with one meaning "all are just alike" and ten meaning "very different from one another", how would you describe stock brokerage firms?

Table 7

Percentage Having Account with Stock Brokerage Firm or Mutual Fund

		SEX		AGE	INCOME				
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
YES	243 24.3%	113 23.8%	130 24.7%	136 31.5%	45 42.4%	50 47.7%	30 64.5%	100 46.3%	243 100.0%
NO	755 75.5%	363 76.2%	392 74.8%	294 67.9%	62 57.6%	55 52.3%	17 35.5%	116 53.4%	-
DON'T KNOW/NO ANSWER	2 .2%	-	2 .5%	2 .6%	-	-	-	1 .3%	-
TOTAL WEIGHTED RESPONDENTS	1000 100.0%	477 100.0%	524 100.0%	433 100.0%	107 100.0%	106 100.0%	47 100.0%	216 100.0%	243 100.0%

Question: Do you currently have an account with a stock brokerage firm or mutual fund?

Table 8

Firm Respondent Has an Account With

		*---SEX----	**	*AGE-**	-----INCOME	-----	-----*		
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
E.F. HUTTON/ SHEARSON-LEHMAN (NET)	17 7.1%	13 11.7%	4 3.0%	12 8.5%	2 3.9%	5 9.1%	3 9.8%	8 7.9%	17 7.1%
DEAN WITTER	14 5.7%	5 4.1%	9 7.0%	5 3.6%	5 10.5%	3 6.2%	-	3 3.0%	14 5.7%
DREYFUS	2 .7%	2 1.5%	-	1 .5%	-	1 1.3%	-	1 .7%	2 .7%
E.F. HUTTON	6 2.4%	5 4.5%	1 .7%	5 3.8%	-	2 4.1%	2 5.6%	2 2.2%	6 2.4%
FIDELITY INVESTMENTS	4 1.5%	3 2.3%	1 .8%	2 1.2%	-	1 2.1%	-	2 2.1%	4 1.5%
MERRILL LYNCH	16 6.5%	11 9.3%	5 4.1%	13 9.5%	2 5.2%	3 5.3%	3 8.8%	8 8.2%	16 6.5%
PAINE WEBBER	6 2.3%	3 2.5%	3 2.1%	3 2.1%	4 8.0%	-	1 2.5%	1 .8%	6 2.3%
PRUDENTIAL-BACHE	5 2.1%	2 1.6%	3 2.6%	2 1.3%	2 3.9%	-	1 2.6%	3 2.6%	5 2.1%
SHEARSON-LEHMAN	11 4.6%	8 7.2%	3 2.4%	6 4.7%	2 3.9%	3 5.1%	1 4.3%	6 5.7%	11 4.6%
SMITH-BARNEY	6 2.6%	4 3.2%	3 2.1%	3 2.3%	1 2.9%	1 2.7%	2 5.9%	3 3.1%	6 2.6%
ANY OTHER	127 52.4%	54 47.5%	73 56.7%	69 50.3%	22 47.6%	26 52.3%	15 50.9%	52 51.5%	127 52.4%
REFUSED/NO ANSWER	46 19.0%	18 16.3%	28 21.4%	28 20.8%	8 18.1%	11 21.0%	6 19.4%	20 20.2%	46 19.0%
ANALYZED WEIGHTED RESPONDENTS	243 99.8%	113 100.0%	130 99.9%	136 100.1%	45 100.1%	50 100.1%	30 100.0%	100 100.1%	243 99.8%

Question: What firm is that? (DO NOT READ LIST)

Table 9

Reason for Choosing Brokerage Firm or Mutual Fund

		---SEX---		AGE	-----INCOME-----				
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
ONE OF THEIR BROKERS CALLED ME	20 10.0%	15 16.3%	4 4.2%	11 10.0%	6 16.8%	3 7.8%	5 21.2%	12 15.2%	20 10.0%
SOMEONE PERSONALLY RECOMMENDED THEM	84 42.7%	37 39.2%	47 46.0%	45 41.7%	13 36.2%	20 49.9%	7 29.7%	32 39.9%	84 42.7%
I KNEW THEY HAD A GREAT REPUTATION	36 18.2%	13 13.3%	23 22.9%	15 14.1%	6 17.3%	4 10.5%	2 10.3%	10 12.7%	36 18.2%
I WANTED TO BE WITH A LARGE FIRM	19 9.9%	9 9.9%	10 9.8%	14 13.0%	6 15.2%	4 10.5%	1 4.2%	6 7.1%	19 9.9%
NONE OF THE ABOVE	37 18.7%	20 21.3%	17 16.4%	22 20.6%	5 14.5%	8 21.3%	8 31.5%	19 24.1%	37 18.7%
DON'T KNOW/NO ANSWER	1 .4%	-	1 .8%	1 .7%	-	-	1 3.2%	1 1.0%	1 .4%
ANALYZED WEIGHTED RESPONDENTS	197 99.9%	95 100.0%	102 100.1%	108 100.1%	37 100.0%	40 100.0%	24 100.1%	80 100.0%	197 99.9%

Question: Which one of the following statements best describes your reason for picking that firm? (READ RANDOMIZED LIST, AS SHOWN IN TABLE)

Table 10

"Within the past 12 months, have you considered changing to some other firm?"

		SEX		AGE	INCOME				
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
YES	44 18.2%	22 19.7%	22 16.9%	21 15.6%	8 16.6%	7 13.2%	7 23.9%	15 15.2%	44 18.2%
NO	198 81.4%	91 80.3%	107 82.3%	114 83.7%	38 83.4%	44 86.8%	22 72.7%	84 83.8%	198 81.4%
DON'T KNOW/NO ANSWER	1 .4%	-	1 .8%	1 .7%	-	-	1 3.4%	1 1.0%	1 .4%
ANALYZED WEIGHTED RESPONDENTS	243 100.0%	113 100.0%	130 100.0%	136 100.0%	45 100.0%	50 100.0%	30 100.0%	100 100.0%	243 100.0%

Table 11

Reported Ownership of Stocks, Bonds or Mutual Funds

A year ago:

		SEX		AGE	INCOME				
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
YES	237 23.7%	114 23.8%	123 23.5%	136 31.5%	46 43.0%	41 38.6%	25 53.1%	97 44.7%	153 62.9%
NO	762 76.2%	363 76.2%	399 76.3%	296 68.3%	61 57.0%	65 61.4%	22 46.9%	119 55.0%	90 37.1%
DON'T KNOW/NO ANSWER	1 .1%	-	1 .2%	1 .2%	-	-	-	1 .3%	-
TOTAL WEIGHTED RESPONDENTS	1000 100.0%	477 100.0%	524 100.0%	433 100.0%	107 100.0%	106 100.0%	47 100.0%	216 100.0%	243 100.0%

Today:

		SEX		AGE	INCOME				
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
YES	229 22.9%	111 23.3%	118 22.6%	130 30.1%	43 40.4%	49 46.7%	24 51.0%	93 43.1%	161 66.3%
NO	767 76.7%	365 76.7%	402 76.8%	299 69.1%	63 58.6%	56 53.3%	22 47.6%	121 55.8%	80 32.8%
DON'T KNOW/NO ANSWER	4 .4%	-	4 .7%	4 .8%	1 1.1%	-	1 1.4%	2 1.1%	2 .9%
TOTAL WEIGHTED RESPONDENTS	1000 100.0%	477 100.0%	524 100.1%	433 100.0%	107 100.1%	106 100.0%	47 100.0%	216 100.0%	243 100.0%

Questions: Thinking back to a year ago, did you then own any stocks, bonds or mutual funds that you yourself had bought? What about today?

Table 12

Expected Change in Stock and Bond Holdings Over Coming Year

		SEX		AGE	INCOME				
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
INCREASE	310	156	154	128	37	42	17	67	114
	31.0%	32.8%	29.3%	29.6%	34.5%	39.9%	35.8%	30.7%	46.8%
DECREASE	58	29	29	32	7	3	1	13	22
	5.8%	6.1%	5.5%	7.4%	6.6%	2.7%	3.0%	6.2%	9.2%
STAY ABOUT THE SAME	554	250	304	236	55	54	23	125	95
	55.4%	52.6%	58.0%	54.6%	51.0%	51.4%	49.9%	57.7%	39.0%
DON'T KNOW/ NO ANSWER	78	41	38	36	8	6	5	12	12
	7.8%	8.5%	7.2%	8.4%	8.0%	6.0%	11.3%	5.4%	5.0%
TOTAL WEIGHTED RESPONDENTS	1000	477	524	433	107	106	47	216	243
	100.0%	100.0%	100.0%	100.0%	100.1%	100.0%	100.0%	100.0%	100.0%

Question: What's your best guess about a year from now--do you expect that your holdings in stocks and bonds will increase, decrease or stay about the same?

Table 13

Identification of Companies Using Advertising Slogans

WE'RE BULLISH ON AMERICA		SEX		AGE	INCOME				
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
CORRECT-MERRILL LYNCH	249 24.9%	165 34.7%	84 16.0%	128 29.5%	35 32.4%	35 33.3%	20 43.7%	87 40.0%	84 34.4%
INCORRECT	85 8.5%	47 9.8%	39 7.4%	39 8.9%	11 10.4%	10 9.5%	6 12.6%	19 8.9%	25 10.1%
DON'T KNOW/NO ANSWER	666 66.6%	265 55.6%	401 76.6%	266 61.6%	61 57.2%	60 57.2%	20 43.6%	111 51.1%	135 55.5%

ROCK SOLID-MARKET WISE		SEX		AGE	INCOME				
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
CORRECT-PRUDENTIAL/ PRUDENTIAL BACHE	133 13.3%	67 14.1%	66 12.6%	55 12.7%	10 8.9%	22 20.5%	7 15.5%	41 18.7%	40 16.6%
INCORRECT	74 7.4%	39 8.2%	35 6.7%	32 7.4%	12 11.1%	7 6.6%	4 8.6%	22 10.1%	28 11.5%
DON'T KNOW/NO ANSWER	793 79.3%	370 77.7%	423 80.7%	346 79.9%	85 79.9%	77 72.9%	35 75.9%	154 71.2%	175 71.9%

WE MAKE MONEY THE OLD FASHIONED WAY-WE EARN		SEX		AGE	INCOME				
	TOTL	MALE	FE-MALE	35 TO 64	$40K TO $49K	$50K TO $74K	$75K PLUS	COLL GRAD/ POST	HAVE ACT
CORRECT-SMITH BARNEY	114 11.4%	89 18.8%	25 4.7%	48 11.1%	14 12.7%	30 28.7%	8 17.7%	45 20.6%	43 17.6%
INCORRECT	155 15.5%	87 18.3%	68 13.0%	71 16.4%	18 17.1%	15 14.3%	12 26.2%	44 20.5%	54 22.3%
DON'T KNOW/NO ANSWER	731 73.1%	300 62.9%	431 82.3%	313 72.4%	75 70.2%	60 57.0%	26 56.1%	128 58.9%	146 60.1%
TOTAL WEIGHTED RESPONDENTS	1000 100.0%	477 100.0%	524 100.0%	433 99.9%	107 100.0%	106 100.0%	47 100.0%	216 100.0%	243 100.0%

Question: Here are advertising slogans used by three financial services companies. Can you give me the names of the companies that use them?

METHODOLOGY

This report is based on responses to 14 questions developed by Newspaper Advertising Bureau and included in the TeleNation survey of January 15-17, 1988. Interviewing was conducted at Market Facts' central telephone center in Oak Park, Illinois. Interviewing was conducted via CRT, allowing complete control of questionnaire execution--automatic skip patterns, range checks, response editing, etc.

TeleNation uses a full-replicated, random-digit-dialing sample of all telephone households, including unlisted phone numbers. In all, 1,004 adults were interviewed: 500 men and 504 women. The data were weighted on a base of 1,000 to take into account the correlated relationship among demographic variables. Weighting was based on gender, age, income and region.

For reporting purposes, eight key variables were extracted from the tabulations: male; female; age 35-64; three levels of household income over $40,000; college graduate or beyond; and a current account with a stock brokerage firm or mutual fund.

The report was written by Charles Lehman of NAB's Research Department.

A7600-4442 1/78

The Recruitment of Nurses

Work Satisfactions and Job Search Strategies

Newspaper Advertising Bureau, Inc.
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THE RECRUITMENT OF NURSES:
WORK SATISFACTIONS AND
JOB SEARCH STRATEGIES

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc. as a service to the newspaper business and its advertisers.

March 1988

Newspaper Advertising Bureau, Inc.

CONTENTS

Page

LIST OF TABLES v

I. INTRODUCTION 1

II. HOW THE STUDY WAS DONE 3

III. HIGHLIGHTS. 5

- A. What Nurses Want in a Job 5
- B. Relocation 6
- C. Seeking a New Job. 8
- D. How to Read This Report. 10
  - 1. The Precision of the Numbers 10
  - 2. The Meaning of the Numbers 11

IV. DETAILED FINDINGS 13

- A. How Many Are Going to Change Jobs? 13
- B. Do Those Who Might Change Jobs Have Different Backgrounds than Those Who Won't Change? . .15
- C. What Do Nurses Want in a Job?. 18
  - 1. The Quality of Work Life 19
  - 2. Career Development 22
    - a. Compensation 22
    - b. Opportunity to Pursue a Chosen Specialty 23
    - c. Advancement. 24
  - 3. Nurses Versus Administration. . . .27
  - 4. Other Factors. 28
- D. Relocation 35
  - 1. Willingness to Relocate 35
  - 2. Who Might Relocate?. 35
  - 3. What Do They Want If They Are to Relocate? 39
    - a. Good Prospects. 39
    - b. Warm Prospects. 42
    - c. Cold Prospects. 43
  - 4. Rating States for Relocation. . . .50
- E. Looking for a Job 53
  - 1. Information Sources. 53
    - a. Ratings of Sources 53
    - b. Most Frequently Used Source . .55
    - c. Summary 55
  - 2. How Nurses Use Newspaper Employment Ads 59
  - 3. What Nurses Say They Want in Ads . .67
  - 4. Blind Ads 70
  - 5. Ad Responses Requested. 72
  - 6. Who Interviews the Applicants . . .75

V. OVERVIEW 77

LIST OF TABLES

Page

1. Nurses' Status in the Job Market..........................17
2. Nurses' Ratings of Features Wanted in a Job...............30
3. Nurses' Rankings of Features Wanted in a Job..............32
4. Nurses' Ratings of Features to be Avoided in a Job.........34
5. Nurses' Feelings about Relocating.........................37
6. Nurses' Feelings about Relocating (Among those who might Change Jobs)...38
7. Nurses' Likelihood of Relocating..........................44
8. Nurses' Likelihood of Relocating, By Demography............45
9. Nurses' Ratings of Characteristics Important for Relocating..47
10. Nurses' Ratings of States for Relocation..................51
11. Nurses' Ratings of the Usefulness of Sources of Employment Information...57
12. Percentage Rating Each Source as "Very Useful".............58
13. Days of the Week Newspaper Read...........................62
14. Frequency of Reading Classified...........................62
15. Days of Week Classified Ads Read..........................63
16. Sections of the Newspaper Read............................64
17. Sections of the Newspaper Usually Looked at for Employment Ads...65
18. Other Sections of the Newspaper Looked at for Employment Ads...66
19. Characteristics Wanted in Newspaper Employment Ads.........69
20. Nurses' Likelihood of Responding to a Blind Ad............71
21. Likelihood of Responding to a Qualified Blind Ad..........73
22. Nurses' Likelihood of Responding to Different Ad Requests..74
23. Nurses' Ratings of Interviewers' Qualifications............76

I. INTRODUCTION

Periodically, during the 1980s, due to changes in government policy, the decline in popularity of the nursing field and the resulting shortage of qualified candidates, those who employ nurses have found it hard to fill positions. Often, in their recruitment efforts, employers have used newspapers and their display classified pages to mount advertising campaigns.

It is not easy to write effective recruitment ads. Even if it were, improvement would always be possible. Clearly, the process of writing good recruitment ads should begin with information on what nurses most want to know about a potential position.

Initially, to find out what nurses want in their jobs, what they don't want, what incentives would motivate them to relocate and how they go about finding a job, the Newspaper Advertising Bureau commissioned a qualitative study. Blanka Eckstein of Social Science Applications conducted one focus group and 18 in-depth interviews with qualified nurses. Eckstein's NAB report, "Nurses' Attitudes Toward Job-Seeking and Recruitment Advertising" (1984) identified what seemed to be some major issues. These became the subjects of a quantitative study whose results are reported here.

II. HOW THE STUDY WAS DONE

In early fall of 1985, Response Analysis Corporation began field work on this study with a national list of registered nurses. The goal was 200 completed interviews with eligible nurses. We began with telephone screening of randomly selected names from the list. We asked those who were not eligible if they knew any nurses who might be eligible. To be eligible, the registered nurse must have been employed in nursing for at least three years, had to be between the ages of 21 and 55 and must have graduated from a bachelor's degree program, an associate's degree program or a diploma school. These are the nurses most in demand by employers. The eligibles were asked to fill out a questionnaire which would be mailed to them. Three hundred and five nurses initially agreed to cooperate. A second mailing was sent out to those who did not return the first questionnaire within two weeks. A total of two hundred twenty two sent in completed, usable questionnaires.

The specificity of the group to be studied (degree-holding nurses between the ages of 21 and 55 with at least three years nursing experience) precluded exact comparisons between the sample and the nursing profession as a whole. However, with respect to at least one attribute, the proportion not married, our sample parallels the census figure for all women who are ages 25 to 55 -- 21% for our nursing sample, 26% for the census.

Leon Aron, Michael Macht and Stuart Tolley (all of NAB) were jointly responsible for study design, questionnaire construction,* and analysis of the data. Tolley wrote the report. Ann Miksovic of Response Analysis Corporation supervised the field and tabulation work and contributed to the questionnaire design and pretesting. Blanka Eckstein aided in the design of the study and the questionnaire design and commented on the report. Edin Hoffman, of Bernard Hodes Advertising, made many helpful comments about the design and the questionnaire. He and Albert Gollin (of NAB) each edited drafts of the report. For support and help all through the study, thanks are also due Ira Gordon (NAB), ANCAM (Association of Newspaper Classified Advertising Managers) and its task force of Jim Roberts of the Chicago Tribune, Jack Ross of the Philadelphia Inquirer, and Gail Hyland of the Los Angeles Times.

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*A copy of the questionnaire used in this survey of nurses is available upon request by writing to NAB's Research Department.

III. HIGHLIGHTS

This study confirms the belief that nursing is a profession in flux. Even though about two-thirds say they are at least reasonably satisfied with their jobs, about half are willing to consider another job and about a seventh are fairly sure they will be in a new job of their own choice soon. About two-thirds are unwilling to relocate. Almost all nurses are women. Therefore, in this report, nurses will be referred to as women, even though some men are nurses.

A. What Nurses Want in a Job

There appear to be five main areas of job assessment.

1. There are certain minimum requirements rated as important by nine out of ten nurses:

    acceptable level of patient care
    proper plant/equipment maintenance
    interdisciplinary cooperation
    collegial relationships with doctors.

2. Almost all nurses are concerned about things that influence their daily work lives.

    adequate staffing
    flexible scheduling
    positive staff-patient relationships.

3. About seven out of ten nurses are concerned about key aspects of their careers. The three most important aspects of career development are:

the opportunity to practice their specialty
monetary benefits (direct and indirect)
clinical advancement.

4. When it comes to hospitals and other large health-care institutions, nurses are concerned about their roles vis-a-vis the administration. They want the support of the administration. They also want some influence in the administration of patient care.

5. Except for adequate maintenance, there is relatively little expressed concern with the physical plant of a hospital or other institution and its location. Neither is there much concern with a hospital's nursing care delivery system (primary care vs. team approach) or the presence or absence of teaching programs or house staff instruction.

B. Relocation

Relocation is not popular with nurses. About a fifth (21%) are likely to change jobs in the next year and also might consider relocation. These are the best prospects for relocation. Another

52% are considering changing jobs and some of these might relocate. These are the warm prospects. The remaining 27% are unlikely to change jobs.

Among the best prospects, we found three different subsegments.

Those in the subsegment made up of somewhat less well paid, younger, married nurses are more concerned about their spouses' jobs, comparable and safe housing, and an increase in salary.

More of those in the subsegment of better paid, older nurses are concerned with educational opportunities.

In the third subsegment of younger, unmarried, less well paid nurses, more want safe housing and help in finding such housing, as well as higher salary.

Among the warm prospects (those nurses who might change jobs), those who are married have different concerns than those who are not married. More of the married nurses are concerned about their spouses' jobs, housing and their families. More of the not married, often with children or others at home, are concerned with money (salary, relocation expenses, etc.) as well as housing.

None of the various groups of nurses attach much importance to the recreational features of a new location, including the cultural advantages of cities. However, other things being equal, Colorado, Hawaii and the Northwest are considered somewhat more desirable while New York, Alaska, the deep South, and some less densely populated Plains states are considered less desirable.

C. Seeking a New Job.

Word of mouth and other personal contacts are considered the most promising sources of job leads. Newspaper employment ads are next best and everything else is much farther down the list. On the average, 69% read a daily newspaper and 93% read a Sunday paper. More of those most likely to change jobs read the newspaper classifieds and read them more frequently. They review more newspaper sections in order to seek those ads.

Regardless of job prospect status, most nurses say they want ads to contain information on the job requirements, the specialty, the job title, the shift, the location and the salary.

Blind ads (a box number without the employer's name) are not popular, even with guarantees that all replies will be held in confidence and answered.

It is clear that nurses prefer job interviews conducted by a nurse, preferably the unit supervisor. Least desirable is a non-nurse personnel department interviewer.

D. How to Read This Report

1. The Precision of the Numbers

One of the main purposes of every quantitative sample is to provide population estimates. Only a census gives exact population figures. Therefore the first issue is the precision of the sample percentages.

For the sample as a whole, a percentage around 50% will give a population estimate that is plus or minus 7 percentage points. [1] That is, a sample figure of 42% means that the population figure is between 35% and 49%.

Percentages that are closer to 100% or 0% yield estimates that are a little more precise. For instance, a sample figure of 20% is plus or minus 5 percentage points.

The smaller the subgroup, the less precise is the estimate. For instance, in the best prospects group, estimates for percentages close to 50% are plus or minus 18 percentage points.

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[1] The 95% confidence level is used throughout this report, both for individual percentages and for differences between percentages.

The second problem is estimating differences in the population. Those differences between sample percentages which reflect differences in the population are referred to as statistically significant differences. The only differences reported in this study are those that are statistically significant.

2. The Meaning of the Numbers

Central to this report are inferences about the meanings of the numbers. Ultimately the meaning of the data depends on the respondents' perceptions of questions asked and the answers given. Developing an understanding of these perceptions requires inferences that go beyond the data. Often extended inferences are necessary to understand those attitudes, beliefs and behaviors which are implicit and these inferences are liberally sprinkled through the report.

IV. DETAILED FINDINGS

A. How Many Are Going to Change Jobs?

Three questions were used to estimate job changes:

1. How satisfied are you with your current employer on an overall basis?

Most nurses (62%) say they are satisfied with their jobs. The remainder are either lukewarm or dissatisfied. Even satisfied nurses will not necessarily remain where they are.

2. Are you actually looking for a job with another employer now? (If not: Are you thinking of looking for a job with another employer now?)

A few nurses (8%) reported currently looking for a new job. An additional 21% said they are contemplating seeking a new one. In all, 29% were either looking for a new job or thinking of looking for one.

3. Realistically, how likely is it that you will change employers in the next year or so?

Looking for a new job or not, satisfied or not, 22% of the nurses estimate that they might change jobs in the next year; 32%

don't know whether they will change or not and the remaining 46% think they won't.

The answers to these three questions do not nest together neatly like a Russian Easter egg. Nor should they. These three questions could hardly be expected to account for all the many reasons for job changes. Sometimes nurses are dissatisfied with their positions or are let go. Spouses are transferred, better opportunities come along, and unpredictable events can affect career decisions.

The group most likely to remain with their employers would be those who both estimate that they won't change jobs in the next year and also are not even thinking of looking for a new job. 43% fit this description. The remaining 57% are actively looking, thinking of looking, or think they might change jobs in the next year.

This 57% can be subdivided into: (1) active job seekers confident they will find new jobs in the next year (14% of the sample); (2) those contemplating a job search who feel they might change in the next year (18% of the sample); and (3) nurses not contemplating a job search who, nevertheless, expect a possible job change in the next year (25% of the sample).

The fact that 57% of the nurses anticipate a possible job change in the next year suggests that most health care employers have morale and personnel problems with their nurses. Regardless of the cause, the basic fact is that over half the nurses anticipate a possible job change in the next year, and that means trouble for health care providers.

By the same token, that means there are many nurses available and amenable to recruitment solicitation.

However, the fact that nurses are receptive to better jobs does not mean they are eager to relocate. Of those anticipating possible job changes in the next year, 63% say they would reject job opportunities that require relocation. Only the remaining 37% might consider relocation. Employers who seek nurses willing to relocate have only 21% of all nurses (37% of the 57% who anticipate job changes) from which to recruit.

B. Do Those Who Might Change Jobs Have Different Backgrounds than Those Who Won't Change?

Compared to all other nurses, how different are the backgrounds of nurses who either seek new jobs or are likely to take new jobs? They are not very different. One might expect job-seeking nurses to be younger, have lower salaries or less education. With one exception, none of the differences from group to group is large enough so that we could be confident that it would be true in the population. The exception is that the 14% who are job seekers are less well educated than the others.

Why is there only one "real" difference? Perhaps this reflects prevailing job dissatisfaction in the field of nursing. There is dissatisfaction among old and young, the well paid and less well paid, established nurses and nurses new to the profession.

TABLE 1

Nurses' Status in the Job Market by Likelihood of Changing Jobs

	Likelihood of Changing Jobs			
	Most Likely	May be Looking/ Might Change	Not Thinking but Might Change	Unlikely to Chang
Total (222 = 100%)[1]	14%	18%	25%	43%
Age				
Less than 25	3%	0%	0%	2%
25-34	27	30	36	29
35-45	57	35	45	38
46-50	10	30	10	16
51 or Over	3	5	9	15
	100%	100%	100%	100%
Sex				
Men	3	5	2	5
Women	97	95	98	95
	100%	100%	100%	100%
Marital Status				
Married	87	70	80	80
Not Married (Single/ Divorced/Widowed/Separated	13	27	20	20
DK/NA	0	3	0	0
	100%	100%	100%	100%
Income				
$30,000 +	4	15	13	14
$20,000-29,999	43	40	38	42
Less than $20,000	53	43	45	42
DK/NA	0	2	4	2
	100%	100%	100%	100%
Education				
Grad Work/Diploma School	57	55	50	57
College Graduate	13	32	29	30
Some College/Associate Degree	30	13	21	13
	100%	100%	100%	100%
Base:	(30)	(40)	(56)	(96)

1. For this row only, percentages total 100%.

Question: Are you actually looking/thinking of looking for a job with another employer now

Question: Realistically, how likely is it that you will change employers in the next year or so?

C. What Do Nurses Want in a Job?

The first concern, for most nurses, is with the quality of their work life. Their second concern is career advancement (including compensation) and the third is their relationships with staff and administration. They also require certain basics of any nursing job.

The identification of these concerns came from three questions.

First, we asked the nurses to rate 34 characteristics in terms of importance in what they look for in a job. We used a ten-point scale where 1 was defined as "of no importance whatsoever" and 10 was defined as "absolutely essential". Conceivably, a nurse could rate every item (or none) as absolutely essential.

For that reason, our second question asked them to choose from among the 34 the one item most important, the item second most important and the item they considered third most important.

Our third question asked them to rate each of 18 characteristics in terms of how likely they would be to avoid or reject a potential employer because of the item.

The data are shown in tables 2, 3 and 4 at the end of this section on pages 30 - 34.

1. The Quality of Work Life

Nurses' definitions of desirable positions begin with adequacy of staffing for the tasks that are to be done. Also important are their relationships with patients. For a smaller number of nurses, flexible scheduling is another plus. Of course, the kinds of patients to be dealt with also affect the work life.

The largest number of respondents cited adequate staffing as the most desirable job characteristic. According to the previous study, "Nurses' Attitudes Toward Job Seeking", adequate staffing is a major barometer of the quality of nurses' work life. Adequate staffing obviates "pulling" nurses from one unit to another and fewer rotations to the night shift.

Nine out of ten (90%) nurses rated adequacy of staffing as 8,9 or 10 in importance (10 was defined as "absolutely essential"). Almost half (47%) gave it a 10. 41% considered it to be either the first, second or third most important item. No other item was considered so important by as many nurses.

Similarly, the opposite of adequate staffing, understaffing, comes up high as something to be avoided in looking for a new job.

Also to be avoided (especially by the best prospects) is inflexible scheduling. Without adequate staffing, flexible scheduling is difficult. Therefore, in some circumstances, inflexible scheduling means inadequate staffing. In addition, inflexible scheduling may mean less leeway for how a nurse does her job.

Another aspect of work life quality is the relationship between staff and patients. Good staff-patient relationships are considered important by more of the best prospects for changing jobs than by the other nurses. Almost all nurses would reject a job where patients received cold impersonal care. The facts are that:

> Among those most likely to change jobs (the 14% who are looking for a job and also feel they will change within the next year) 90% rate staff-patient relationships as important (either 8, 9, or 10 on the scale). Among all other nurses, only 69% gave this item a rating that high.
>
> One out of five (20%) of those in the best prospect group rank staff-patient relationships as either first, second or third

in importance. While considerably below the 41% who ranked adequate staffing as first, second or third, 20% is statistically significantly higher than the comparable ranking given 24 other items by this group. In all, 33 items were asked about.

93% of those most likely to change jobs and marginally higher proportions of the other groups indicated they would be likely to avoid or reject any position where they felt there was cold impersonal care for the patients.

The inference here is that nurses prize warm, supportive, yet professional relationships with patients. Such relationships probably make the nurse's work life more pleasant and help her do what she came to the profession to do: help sick people get better.

Another variable influencing work life is the type of patient population served. Some institutions have more than their share of welfare cases, for instance. Since many nurses are likely to be reluctant to admit that they would prefer not to deal with certain patient populations, the data may underrepresent the truth. The fact is that 20% indicated that the patient population is important enough for them to give it an 8, 9 or 10.

2. Career Development

Three professional career development issues identified by this study are: compensation; opportunity to pursue a chosen specialty; and advancement.

a. Compensation

Five items were used to measure the place of money in nurses' minds. From the list of items rated in terms of importance, two clearly central items are: starting salary and differentials; and salary increases based on performance. A third from the list -- formal performance evaluation procedures -- would play a part in those cases when salary increases are based on performance evaluations. The other two items are based on their importance in rejecting a position: somewhat lower than competitive salaries; inadequate fringe benefits.

The data confirm the finding in "Nurses' Attitudes Toward Job Seeking and Recruitment Advertising" that money is not the highest rated item; adequacy of staffing is. However, about a third (34%) of the nurses considered starting salary as either the most important, the second, or the third most important item. Only adequacy of staff was considered as important by more nurses. Although 34% is a high number, in this context, it also means that 66% of the nurses did not consider starting salary either first, second or third most important. About two thirds (65%) of the nurses would be willing to consider a job with a somewhat lower than competitive salary. Similarly, 63% are not likely to avoid a job (that is, might consider a job) with inadequate fringe benefits. It may be that, while money and fringe benefits are important, other satisfactions are even more important. Perhaps money engenders conflict for some nurses. In some cases, nurses may deem concerns for salary and benefits "unprofessional".

On all five items, the differences between those likely to remain in their present positions and those who might find other employment are small enough that they could be considered sampling accidents. The differences are in the expected direction -- those more likely to leave are more concerned; those less likely are less concerned.

b. Opportunity to Pursue a Chosen Specialty

Concern for a chosen speciality may be a close second to money matters. About three quarters (73%) of the nurses rate the opportunity to pursue one's chosen specialty as important but many fewer -- 17% -- consider it to be either first, second, or third most important. About half the nurses (47%) say they would avoid a potential job with the wrong nursing specialization.

c. Advancement

1. Although advancement may be less central than money or professional specialty, the differences among the three career issues are small.
2. Clinical advancement seems more important than administrative advancement (our qualitative study suggested that clinical advancement includes expanding knowledge and skills, and greater responsibility, while not leaving the "hands-on" or bedside part of nursing).
3. Advancement is important to more of those likely to change jobs than to those likely to remain. The more likely nurses are to change jobs, the more they consider advancement important.

Advancement is defined broadly here, including opportunities for retraining and further education. Of the seven advancement-related items, five show statistically significant or "real" differences between those most likely to change and the other nurses. The correlations and other statistics are simply evidence for the relationship between a desire for advancement and the willingness to seek another job. Like most Americans, Florence Nightingale sometimes wants to move up in the world and when she does, she looks for another job.

> Of those most likely to change, 77% rate the item, clinical advancement opportunities, as 8, 9 or 10 in importance. Of all the others, 55% give this item that rating. This is the only item of the five listed here that does not show the orderly drop in importance ratings across the four groups of nurses that shows a correlation between two variables. Instead, there is a "real" difference between those most likely to change and the other three groups taken together.

For the next four items, there are (low but statistically significant) correlations between importance rating and the likelihood of changing jobs: the more likely nurses are to change jobs, the more of them rate the item as important. The facts follow.

> On the item, clinical conferences and seminars, the total of ratings of 8, 9 or 10 go from 63% for those most likely to change jobs to 52% to 50% to 42% for the other three groups.

The same kind of relationship can be seen with respect to the item, opportunity to retrain or change specialty, ranging from 57% of the most likely job changers giving an 8, 9, 10 rating to 42% to 45% and then down to 30% for those most likely to stay where they are.

The figures for the item, administrative advancement opportunities, show the same kind of progression: 53%, 40%, 39% and 30%.

Some nurses report that lack of educational benefits would dissuade them from a job. This is more important to those likely to change jobs than to other nurses. The figures are 47%, 22%, 38% and 24%.

The same relationship is also supported by the data on rankings: of those nurses most likely to change jobs, 30% rank the first four items as either first, second or third in importance. Of all the other nurses, 12% rank these items the same way.

Of all nurses, 60% rated availability of educational programs as an 8, 9 or 10. Only 4% ranked it as either first, second or third most important.

One conspicuous negative job motivator is: lack of advancement opportunities. There is no consistent relationship across the four job change groups. About half (47%) of all nurses want advancement opportunities.

3. Nurses versus Administration

Another issue identified in the earlier qualitative study was the apparent conflict between some nurses and "the administration". These nurses questioned whether the hospital administration provide support for their clinical decisions and their professional principles and "rights". They questioned the influence of their Nursing Department vis-a-vis the hospital. These issues seem to crystallize the conflict and powerlessness many nurses feel within the "system". Many nurses also wanted respect and collegial relationships with physicians.

Eleven of the items referred to one or another aspect of these conflicts. Four of those eleven items are rated highly. Two of the four, integrity of the hospital leadership and administrative support for clinical decisions, are rated as important by 79% and 76%, respectively. A third, nursing department's influence in the administration, is of importance to more of those most likely to change jobs (77%) than to the others (57%). This difference is statistically significant. A fourth item, uncooperative nurses administration (from the list of items that nurses might avoid when looking for a new job) is also of importance to more of those likely to change jobs than to the others. It would be avoided by 90% of the nurses who are most likely to change jobs but by only 70% of the other nurses.

Interaction with physicians is a constant reminder to nurses of their subordinate role. Lack of respect/not being treated like a colleague is important enough that 49% of the nurses say it would be grounds for refusing a job. The same point is made by the 71% who rate as important the item, colleague-like relationship between physicians and nurses.

Fewer nurses would avoid positions with a rigid administration, or unionization. On the other hand, fewer seek jobs with: administrative decision-making influence, administrative program for nurses recognition, or participation in rounds, practice committees and other interdisciplinary programs.

4. Other factors.

Some of the other items referred to the characteristics of the physical location -- the place itself. Most nurses don't consider these items important. The items were

accessibility of location;

desirability of location;

uncomfortable commute (to be avoided in a job);

condition of the buildings;

layout of the buildings;

dated equipment (to be avoided in a job);

size of the facility.

type of facility

Neither of the two items used to measure nursing care delivery systems (primary care approach to nursing; team approach to nursing) was rated important by as many as half the nurses. Neither were the two items used to measure nursing care setting (teaching hospital affiliation, small community hospital). Only four in ten nurses (40%) said type of facility was important. Only 7% would avoid a position in a small community hospital; only 27% consider a teaching hospital affiliation important.

TABLE 2

Nurses' Ratings* of Features Wanted in a Job, by Likelihood of Changing Jobs

		Likelihood of Changing Jobs			
	Total	Most Likely	May be Looking/ Might Change	Not Thinking but Might Change	Unlikely to Change
Adequacy of staffing	90%	97%	92%	89%	86%
The character of staff-patient relations	72	90	67	64	73
Administrative support for clinical decision-making	76	87	80	68	76
Adequate maintenance of equipment	71	87	70	66	69
Cooperation between medical and technical staff	73	87	65	71	74
Integrity of hospital leadership	79	83	82	75	78
Up-to-date technology	70	80	60	79	66
Opportunity to pursue a chosen specialty	73	80	80	77	67
Colleague-like relationship between physicians and nurses	71	80	65	70	72
Nursing department's influence in the administration	60	77	57	63	53
Salary increases based on performance	73	77	85	71	68
Clinical advancement opportunities	58	77	52	64	51
Starting salary and differentials	74	70	82	75	71
Clinical conferences and seminars	49	63	52	50	42
Accessibility of location	50	63	60	54	41
Administrative decision-making influence	48	60	50	45	46
Availability of educational programs	60	57	55	70	57
Opportunity to retrain and change specialty	40	57	42	45	30
Administrative advancement opportunities	37	53	40	39	30
Desirability of location	45	53	47	55	35
Formal performance evaluation procedures	40	50	47	36	35
Administrative program for nurses' recognition	44	43	35	34	26
Participation in rounds, practice committees, and other interdisciplinary programs	31	43	35	29	27

TABLE 2 (continued)

	Total	Most Likely	May be Looking/ Might Change	Not Thinking but Might Change	Unlikely to Change
Educational assistance programs	40%	43%	40%	43%	38%
Primary care approach to nursing	34	43	28	29	38
Flexibility of scheduling	37	43	32	36	38
Condition of buildings	35	40	32	36	34
Type of facility	40	40	42	39	40
Team approach to nursing	28	33	28	25	28
Teaching hospital affiliation	31	27	35	29	31
Type of patient population served	21	20	30	23	17
Layout of buildings	16	13	22	18	13
Required membership in professional organizations/unions	12	13	13	11	11
Size of a facility	9	7	13	7	8
Base:	(222)	(30)	(40)	(56)	(96)

* Percentage of respondents giving a rating of 8, 9, or 10

Question: Please rate each item in terms of how important it is to you when looking for a new job or when considering a new job.

TABLE 3

Nurses' Rankings* of Features Wanted in a Job, by Likelihood of Changing Jobs

		Likelihood of Changing Jobs			
	Total	Most Likely	May be Looking/ Might Change	Not Thinking but Might Change	Unlikely to Change
Adequacy of staffing	41%	40%	42%	50%	36%
The character of staff-patient relations	14	20	15	11	14
Administrative support for clinical decision-making	26	23	35	18	27
Adequate maintenance of equipment	4	7	3	0	5
Cooperation between medical and technical staff	4	3	0	5	7
Integrity of hospital leadership	22	27	28	18	21
Up-to-date technology	9	13	8	7	9
Opportunity to pursue a chosen specialty	17	17	15	14	20
Colleague-like relationship between physicians and nurses	18	27	13	18	19
Nursing department's influence in the administration	10	3	13	13	10
Salary increases based on performance	9	10	5	11	9
Clinical advancement opportunities	9	20	5	11	16
Starting salary and differentials	34	33	35	43	28
Clinical conferences and seminars	2	7	3	0	5
Accessibility of location	4	0	8	5	2
Administrative decision-making influence	2	0	3	2	4
Availability of educational programs	4	0	8	2	4
Opportunity to retrain and change specialty	2	3	3	4	1
Administrative advancement opportunities	2	0	3	2	2
Desirability of location	4	3	5	4	3
Formal performance evaluation procedures	0	0	3	0	0
Administrative program for nurses' recognition	0	0	0	0	1
Participation in rounds, practice committees, and other interdisciplinary programs	2	3	3	2	2

TABLE 3 (continued)

	Total	Most Likely	May be Looking/ Might Change	Not Thinking but Might Change	Unlikely to Change
Educational assistance programs	3%	0%	3%	7%	2%
Primary care approach to nursing	9	10	3	7	10
Flexibility of scheduling	23	27	13	30	22
Condition of buildings	0	0	0	2	0
Type of facility	9	3	10	9	9
Team approach to nursing	2	0	3	0	4
Teaching hospital affiliation	4	0	3	2	7
Type of patient population served	1	3	0	2	1
Layout of buildings	0	0	3	0	0
Required membership in professional organizations/unions	0	0	0	0	0
Size of a facility	1	0	0	2	1
Base:	(222)	(30)	(40)	(56)	(96)

* Percentage of respondents giving a rank of first, second, or third

Question: Select the three items that are most important, ranking them in order of importance.

Note: The sequence of items is the same as in Table 2.

TABLE 4

Nurses' Ratings* of Features to be Avoided in a Job
by Likelihood of Changing Jobs

		Likelihood of Changing Jobs			
	Total	Most Likely	May be Looking/ Might Change	Not Thinking but Might Change	Unlikely to Change
Poor medical practices	97%	93%	95%	100%	98%
Cold, impersonal care	92	93	85	93	94
Uncooperative nurses administration	73	90	65	70	72
Inflexible scheduling	64	80	50	64	66
Relocation necessary	63	73	57	63	64
Lack of respect/not being treated as colleague	49	63	38	46	52
Understaffing	67	63	75	64	63
Lack of advancement opportunities	47	60	38	64	36
Rigid administration	41	53	38	34	44
Uncomfortable commute	38	47	42	34	36
Wrong nursing specialization	47	47	50	41	49
Lack of educational benefits	30	47	22	38	24
Dated equipment	37	43	32	36	38
Inadequate fringe benefits	37	37	47	43	29
Unionization	31	33	28	25	34
Somewhat lower than competitive salary	35	33	40	34	34
Interviewer made a poor impression	30	30	35	21	32
Small community hospital	7	0	10	11	5
Base:	(222)	(30)	(40)	(56)	(96)

*Percentage giving a rating of 8, 9, and 10

Question: Please rate each of the factors listed below in terms of how likely you would be to reject potential employment because of that factor.

D. RELOCATION

1. Willingness to Relocate

Most nurses do not want to relocate. On the scale of 1 to 10 where 10 means "would always reject the job" and 1 stands for "would never reject the job", only 5% responded 1, 2 or 3 to relocation. Another 63% gave it an 8, 9 or 10. Four out of ten — 41% — gave it a 10 which means that they would always reject a potential job that required relocation.

2. Who Might Relocate?

The employer eager to convince nurses to relocate might take into account both the personal characteristics of the nurses who might relocate and also the inducements these nurses would consider to be important in relocation. Benefits plans can be packaged to offer these nurses what they want most. Advertising can emphasize those benefits and can be targeted to those particular nurses.

Even though most would rather not relocate, some might consider it. However, as far as advertisers are concerned, the important question is not the proportion of all nurses who say they might consider relocation but rather the proportion of potential job changers who are willing to relocate. (The broadest definition of potential job changers would include all nurses except those who both think they will not change jobs and are not even thinking of looking.) In fact, 37% of potential job change nurses do not reject relocation, that is, do not rate it 8, 9, or 10. That represents 21% of all nurses in the survey. What are those nurses like?

Among those nurses who are potential job changers -- might change jobs -- those who would consider relocation tend to have higher incomes than those who would not consider relocation. For instance, among those who might change jobs and also would consider relocation, 24% have incomes over $30,000 while among those who might change jobs but would not consider relocation, only 4% have incomes over $30,000.

Why should more of those with higher personal income be willing to consider relocation? The data do not provide a simple answer to that question but one hypothesis is that those who are willing to take steps to get better jobs finally end up, over time, making more money. Considering relocation is one such step.

TABLE 5

Nurses' Feelings about Relocating

	Might Consider Relocation[1]	Would not Consider Relocation
Total (222 = 100%)*	37%	63%
Sex		
Male	8%	1%
Female	92	99
	100%	100%
Age		
Less than 24	3	1
25-34	34	29
35-45	35	45
46-50	20	13
51 or older	8	12
	100%	100%
Marital Status		
Married	69	85
Not married (Single/ Wid/Sep/Div)	31	14
DK/NA	0	1
	100%	100%
Salary		
$30,000 +	25	5
$20,000-29,999	47	37
Less than $20,000	28	54
DK/NA	0	4
	100%	100%
Education		
Grad Work/Diploma School	59	53
College Graduate	23	30
Some College/Associate Degree	18	17
	100%	100%
Base:	(81)	(141)

* For this row only, percentages total 100%

Question: "...how likely would you be to reject potential employment because of that factor (i.e., relocation necessary)"

1. Percentage giving a rating of 1 to 7

2. Percentage giving a rating of 8, 9, or 10

TABLE 6

Nurses' Feelings about Relocating Among Those Who Might Change Jobs

	Might Change Jobs	
	Might Consider Relocation[1]	Would Not Consider Relocation[2]
Total (126 = 100%)*	37%	63%
Sex		
Male	7	1
Female	93	99
	100%	100%
Age		
Less than 24	2	0
25-34	37	29
35-45	35	50
46-50	22	13
51 or older	4	8
	100%	100%
Marital Status		
Married	72	83
Not married (Single/Wid/Sep/Div)	28	16
DK/NA	0	1
	100%	100%
Salary		
$30,000 +	24	4
$20,000-29,999	50	34
Less than $20,000	26	58
DK/NA	0	4
	100%	100%
Education		
Grad Work/Diploma School	56	55
College Graduate	26	30
Some College/Associate Degree	18	15
	100%	100%
Base:	(46)	(80)

*For this row only, percentages total 100%

Question: "...how likely would you be to reject potential employment because of that factor (i.e., relocation necessary)"

1. Percentage giving a rating of 1 to 7
2. Percentage giving a rating of 8, 9, or 10

Question: Are you actually looking/thinking of looking for a job with another employer now?

Question: Realistically, how likely is it that you will change employers in the next year or so?

3. What Do They Want If They Are to Relocate?

We asked each nurse to rate 24 characteristics that might be important if she were to accept a job that requires relocation. Each characteristic was rated on a scale from 1 (not at all important to accepting a job requiring relocation) to 10 (absolutely essential to accepting a job requiring relocation).

In this part of the analysis the sample is divided, first, into best prospects, warm prospects and cold prospects. Then, in order to generate some hypotheses, these groups are further subdivided. To help the reader avoid the temptation of giving the data more precision than warranted by such small subgroups, we use no exact percentages here. Tables 7, 8 and 9 are on pages 43 through 50.

a. Best Prospects

There are 46 nurses who could be defined as the best prospects: they might change jobs and also would be willing to consider relocation. These 46 represent 21% of all nurses in the sample. This 46 member group of best prospects is split into three subgroups.

All of those in the largest subgroup of these best prospects are married, are less than 46 years old and have personal incomes from nursing of less than $30,000 a year. However, their household incomes are considerably higher, and they have children at home.

> Their first concern about relocation is for their spouse: his attitude toward relocation, and the availability of a good job for him at the new location. Many want the new employer to help find that good job. For many, new housing is almost as important as spousal concerns. The housing into which they would move should be equal to what they leave. Generally that means the cost of the new housing and the mortgage should be about the same as what they now have. A safe neighborhood is important. They would like good schools and clean air. They might even want some help in selling their present homes. They don't want hospital subsidized housing. The assumption is that the new job either would have a higher salary than the present job or else the new employer would pay at least a major part of the cost of relocation or both. Perhaps as insurance, they would like to find a location where there are other potential employers nearby.

Another, smaller subgroup of best prospects is comprised of nurses who are all at least 46 years of age and have salaries from nursing of $30,000 or more. Because some of these nurses are not married, this group's average household income is not as high as is the first group but then fewer of those in the second group have children or others to support.

> Married nurses in this subgroup are also concerned about their spouses' attitudes toward relocation and the availability of suitable jobs for them. Of primary importance to this group, as with the younger (i.e. less than 46) married group, is the promise of a higher salary, and comparable housing. Safety of the residential neighborhood is not rated as important by many and therefore is probably taken for granted. Unlike the younger married good prospects, this group is attracted by the availability of courses at educational institutions.

A third subgroup, also small, is made up of younger unmarried nurses with incomes under $30,000. Their average household income is substantially below that of the younger married group.

> Even so, some of them have a child or another person living at home with them. Like the other two subgroups, they want good housing, a safe neighborhood, and a higher salary. Unlike the other two groups, some of them -- perhaps the youngest -- want help in going through the steps of finding new housing. This suggests that, unlike the older, higher income nurses, some of them are not too sure of themselves.

For all three of these subgroups, very few nurses rate as important: ease of getting away to the mountains or lakes; accessibility of recreational/resort areas; recreational facilities, proximity of stores/shopping centers or proximity of the city/-cultural life of the city into which the nurse might relocate. Few say climate or the age of children is important to the relocation decision. These factors should not be ignored since, if all else were equal, they might be important. But the spouse's attitude and employment, as well as housing and a better salary are of major importance to the best prospects surveyed.

b. Warm Prospects

In addition to the 21% of all nurses who are best prospects, about half (52%) of all nurses say that either they might change jobs (even though they are unlikely to relocate) or they might relocate (even though they are unlikely to change jobs).

The warm prospects who are married have lower annual household incomes than the married good prospects but similar proportions have children at home. That means they have less disposable income.

> Like the good prospects, they are concerned about their spouses' attitudes toward relocation and the availability of good jobs for them; good, safe housing and better salaries. More of them than of the married good prospects say their children's attitude toward relocation is important to them. Perhaps for some of them, putting down roots is important.

The warm prospects who are single have lower annual household incomes than either of the two married groups, even though a substantial proportion of them have children or others at home.

> This group has perhaps the lowest disposable income per person and therefore, perhaps the lowest average standard of living. Many of them mention, as important for relocation, good, safe housing (and at about the same cost as their present home), higher salaries and financial and logistical help in relocating. Compared to all other nurses, more of them are concerned with the proximity of city/cultural life.

c. Cold Prospects

The remaining 27% of all the nurses say they will not change jobs and, even if they did, they would not relocate. Compared to the rest of the nurses, fewer cold prospects gave a rating of importance to 23 of the 24 characteristics. Even the exception (the availability of courses at educational institutions) was not rated important by many. Obviously, the question was less relevant to these respondents than it was to the other prospects.

In demographics, the cold prospects are quite similar to the married warm prospects.

TABLE 7

Nurses' Likelihood of Relocating by Prospect Status

	Good Prospects Would Change and Relocate	Warm Prospects Would Change or Relocate	Cold Prospec Would not Change or Relocate
Total (222 = 100%)	21%	52%	27%
Age			
Less than 24	2%	1%	2%
25-45	72	75	68
46 or Over	26	23	30
	100%	100%	100%
Marital Status			
Married	72	77	89
Not Married (Single/Wid/Sep/Div)	28	23	11
	100%	100%	100%
No. of Persons in Household			
One	15	8	3
Two-four	61	76	75
Five or more	24	16	22
	100%	100%	100%
No. of Persons Under 18			
None	50	27	23
One-three	44	66	72
Four or more	4	1	3
DK/NA	2	6	2
	100%	100%	100%
Individual Income			
$30,000 +	24	12	5
Less than $30,000	74	84	92
DK/NA	2	4	3
	100%	100%	100%
Family Income			
$30,000 +	76	76	77
Less than $30,000	22	20	20
DK/NA	2	4	3
	100%	100%	100%
Base:	(46)	(116)	(60)

Question: Are you actually looking/thinking about looking for a job with another employer now?

Question: "...how likely would you be to reject potential employment because of that factor (i.e., relocation necessary)"

TABLE 8

Nurses' Likelihood of Relocating, by Demography Within Prospect Status

	Good Prospects Would Change and Relocate			Warm Prospects Would Change or Relocate		Cold Prospects Would not Change or Relocate
	Married Less Than $30,000	Greater Than $30,000	Single Less Than $30,000	Married	Single	All
Total (222 = 100%)*	12%[1]	5%[1]	4%[1]	40%	12%[1]	27%
Age						
Less than 24	4%	0%	0%	1%	4%	2%
25-45	74	45	100	75	74	68
46 or Over	22	55	0	24	22	30
Marital Status						
Married	100	55	0	100	0	89
Not Married (Single/Wid/Sep/Div)	0	45	100	0	100	11
No. of Persons in Household						
One	0	18	63	0	30	2
Two-Four	68	63	37	34	62	78
Five or More	32	18	0	66	4	22
DK/NA	0	0	0	0	4	0
No. of Persons Under 18						
None	33	73	75	22	41	23
One-Three	60	18	25	75	33	72
Four or More	7	0	0	3	0	3
DK/NA	0	9	0	0	26	2

Cont'd.

TABLE 8 (Cont'd.)

	Good Prospects Would Change and Relocate			Warm Prospects Would Change or Relocate		Cold Prospects Would not Change or Relocate
	Married Less Than $30,000	Greater Than $30,000	Single Less Than $30,000	Married	Single	All
Individual Income						
$30,000 +	0%	100%	0%	7%	22%	5%
Less than $30,000	100	0	100	91	70	92%
DK/NA	0	0	0	2	8	3%
Family Income						
$30,000 +	89	100	0	87	40	78
Less than $30,000	11	0	88	12	49	20
DK/NA	0	0	12	1	11	2
Base:	(27)	(11)	(8)	(89)	(27)	(60)

Question: Are you actually looking/thinking about looking for a job with another employer now?

Question: "...how likely would you be to reject potential employment because of that factor (i.e., relocation necessary)"

*

[1] Note small base. Percentages listed only for illustrative purposes.

TABLE 9

Nurses' Ratings of Characteristics Important for Relocating, by Demography Within Prospect Status

		Likelihood of Relocating					
		Good Prospects			Warm Prospects		Cold Prospects
	Total	Married[1] Less Than $30,000	Greater[1] Than $30,000	Single[1] Less Than $30,000	Married	Single[1]	All
Same or better quality of housing	81%	85%	73%	63%	82%	81%	48%
Spouse's attitude toward relocation	79	93	55	13	91	30	54
Job availability for your spouse	76	93	45	13	89	22	52
Substantial salary increase	76	74	73	50	76	85	45
Facility in a good, safe neighborhood	69	78	18	63	71	78	42
Same or lower mortgage rates in new location	69	74	64	38	73	70	40
Same or lower cost of living in a new location	69	70	64	38	72	74	40

Cont'd.

TABLE 9 (Cont'd.)

		Likelihood of Relocating					
		Good Prospects			Warm Prospects		Cold Prospects
	Total	Married Less Than $30,000	Greater Than $30,000	Single Less Than $30,000	Married	Single	All
Relocation assistance, such as paying your moving expenses	68%	74%	64%	38%	69%	81%	37%
Good school for children	64	63	9	25	72	48	45
Difficulty of selling the present house or apartment	64	59	27	25	64	74	44
Children's attitude toward relocation	59	56	0	0	70	44	41
Clear air	58	63	36	38	57	70	35
Many potential employers/availability of alternate employment in the area	55	63	45	25	58	59	31
Help in finding suitable employment for spouse	50	74	36	0	56	19	33
Proximity of city/cultural life	46	37	45	0	46	70	27
Proximity of stores/shopping centers	42	44	18	0	49	44	23

Cont'd.

TABLE 9 (Cont'd.)

		Likelihood of Relocating					
		Good Prospects			Warm Prospects		Cold Prospects
	Total	Married Less Than $30,000	Greater Than $30,000	Single Less Than $30,000	Married	Single	All
Age of your children	36%	22%	0	13%	39%	30%	29%
Availability of recreational facilities	34	26	27	25	39	44	17
Help in finding a new house or apartment	31	26	9	50	36	44	12
Ease of getting away to mountains, lakes, etc.	30	30	36	25	31	41	14
Climate	29	26	27	38	30	37	15
Availability of courses at educational institutions	25	48	73	13	26	48	25
Hospital-provided or facility-provided housing or subsidized housing	6	7	0	13	9	7	1
Base:	(222)	(27)	(11)	(8)	(89)	(27)	(60)

Question: Please rate all the features listed below on how important they would be to you in deciding to accept a job offer involving relocation.

[1] Note small base. Percentages listed only for illustrative purposes.

4. Rating States for Relocation

The nurses were asked which states they would prefer to go to and which they would not go to. No state was preferred by as many as 25% of the nurses and only one was rejected by more than 25%. Preferred by the largest proportions and rejected by the smallest proportions are Colorado, Hawaii, North Carolina, Oregon and Washington. California and Florida are preferred by many but rejected by almost as many. On the other hand, Alaska, New York, Alabama, Mississippi, Kansas and North Dakota are states that at least 17% of the nurses said they would avoid and very few nurses said they would prefer.

TABLE 10

Nurses' Ratings of States for Relocation*

	Would Prefer	Would Avoid
Alabama	2%	25%
Alaska	6	41
Arizona	14	7
Arkansas	2	15
California	28	18
Colorado	29	2
Connecticut	10	5
Delaware	2	6
District of Columbia	3	18
Florida	23	20
Georgia	7	14
Hawaii	21	11
Idaho	2	9
Illinois	4	11
Indiana	1	7
Iowa	2	14
Kansas	1	17
Kentucky	3	10
Louisiana	2	16
Maine	10	10
Maryland	4	4
Massachusetts	12	7
Michigan	4	9
Minnesota	5	10
Mississippi	0	20
Missouri	5	6
Montana	3	10
Nebraska	1	10
Nevada	2	9
New Hampshire	6	6
New Jersey	2	13
New Mexico	7	10
New York	5	24
North Carolina	15	4
North Dakota	1	17
Ohio	2	8
Oklahoma	3	12
Oregon	13	5
Pennsylvania	10	5
Rhode Island	3	6
South Carolina	9	5
South Dakota	1	13
Tennessee	6	9
Texas	13	15
Utah	3	8
Vermont	12	6
Virginia	13	3
Virgin Island	8	12
Washington	14	5
West Virginia	2	6
Wisconsin	4	8
Wyoming	5	12
Base:	(222)	(222)

Question: If you were to relocate, please specify which states you would most prefer to/would not go to.

* Percentage who report they would prefer/avoid relocating to.

E. LOOKING FOR A JOB

1. Information Sources

Two questions were used to ascertain nurses' employment information sources. The first question asked the nurses to rate each of 14 sources of information in terms of whether each source was "very useful", "useful", "not very useful", "not at all useful" or "not familiar with this source". Many nurses rated several sources as very useful.

The second question asked the nurses to choose the one source, of the fourteen, other than personal contacts, that they used most often when either looking for a job, contemplating a job change or just monitoring job opportunities.

Tables 11 and 12 are on pages 57 and 58.

a. Ratings of Sources

Of all nurses, 75% considered personal contacts and word of mouth a very useful way to learn about employment opportunities. None of the other 13 sources came close to these two.

Newspaper employment ads dominate the other alternatives. 39% say that newspaper employment ads are very useful. A poor third best source is the combination of ads in either nursing journals, or nursing and other medical magazines, or both. (Nursing journals were asked about separately from nursing and other medical magazines. Ads in nursing or other medical magazines were mentioned by 16% and ads in nursing journals by 14%. Only 20% say that ads in either these magazines or these journals or both are very useful.)

On Table 11, the first column on the left shows the figures for "very useful" for all the sources of information.

The more likely nurses are to be employment prospects, the more likely they are to rate newspaper employment ads as very useful. Among the best prospects for a new job, 53% say that newspaper employment ads are very useful. Among the next best group, the figure is 45%.[2]

It is also true that the more likely a nurse is to change jobs, the more likely she is to rate ads in nursing or other medical magazines as very useful.

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[2] The rank order correlation of +.15 between likelihood of changing jobs and rating of newspapers as very useful is statistically significant.

However, it is not true that those who are most likely to change jobs are also more likely to rate all sources as very useful. For all the other eleven sources, taken either separately or together, there is no relationship between likelihood of changing jobs and considering the source very useful.

20% of the nurses say that radio and 21% that television commercials are not at all useful. 15% say the same about direct mail employment advertising. The comparable figure for newspapers is only 2%. 42% are not familiar with computerized employment data banks and 21% are not familiar with state employment services.

b. Most Frequently Used Source

When nurses were asked which was the most frequently used source of employment information, excluding personal contacts, 60% indicated newspaper employment ads. Among the two groups of nurses who are the best prospects for a new job, the figure is 70%.

No other source was mentioned by more than 8% of all nurses as can be seen in the far right column of Table 12.

c. Summary

Apart from personal contacts, which far outweigh any other sources, newspaper classified ads are the most important and most used information source. No other ad source comes even close. The closer a nurse comes to changing jobs, the more useful are newspaper classified ads.

TABLE 11

Nurses' Ratings of the Usefulness of Sources of Employment Information

	Ratings of Usefulness			
	Very Useful	Intermediate Usefulness	Not at All Useful	Not Familiar With Source
Word of mouth/personal contacts/ personal network	75%	25%	0	0
Newspaper employment ads	39	59	2	0
Employee referral programs	17	63	1	17
Ads in nursing or other medical magazines/newspapers	16	75	8	1
Nursing association	15	74	7	4
Ads in nursing journals	14	77	8	0
Employment agencies/registries	14	68	10	8
Job directories and guides	14	69	6	10
Job fairs	12	71	5	11
Open houses	12	73	5	8
Employment advertising through the mail	8	69	15	7
Computerized employment data banks	7	43	6	42
State employment services	5	65	9	21
TV commercials	4	62	21	13
Radio commercials	1	64	20	13

Base: (222)

Some rows do not total 100% because "DK/NA" responses excluded.
Question: Please rate each item below in terms of how useful it is or would be as a source of employment information.

1. Very useful
2. Useful
3. Not very useful
4. Not familiar with source

TABLE 12

Nurses' Rating Each Source of Employment Information as "Very Useful" by Likelihood of Changing Jobs; Percent Using Each Source Most Often

			Likelihood of Changing Jobs			
	Total	Most Likely	May be Looking/ Might Change	Not Thinking/ Might Change	Unlikely to Change	% Using Each Source 'Most Often'
Word of mouth/personal contacts/ networks	75%	80%	65%	77%	77%	0%
Newspaper employment ads	39	53	45	39	32	60
Employee referral programs	17	23	20	11	17	1
Ads in nursing or other medical magazine	16	23	22	18	10	8
Nursing association	15	10	10	20	17	1
Ads in nursing journals	14	13	22	14	10	8
Employment agencies/registries	14	13	20	11	13	5
Job directories and guides	14	17	13	18	11	5
Job fairs	12	7	10	13	14	1
Open houses	12	13	8	9	16	3
Employment advertising by mail	8	7	10	7	7	1
Computerized employment data banks	7	10	13	5	5	1
State employment services	5	10	3	5	3	3
TV commercials	4	3	0	4	5	0
Radio commercials	1	3	3	2	0	0
Base:	(222)	(30)	(40)	(56)	(96)	(159)*

*Those nurses who mention word of mouth/personal contact (n=69) as source used most often are excluded from base.

Question: Please rate each item listed below in terms of how useful it is or would be as a source of employment information.

Question: Other than personal contact, what one source of employment information do you/would you use most often when looking for a job, thinking of changing jobs, or when just monitoring job opportunities?

2. How Nurses Use Newspaper Employment Ads

The process begins with reading the paper: almost all nurses read the Sunday paper and three-quarters read them daily. Advertisers considering special recruitment campaigns which would go beyond the classified section can make use of those sections of the paper that nurses usually read. Nurses look at the classified sections often and the best prospects for jobs look more often. Compared to other nurses, the good prospects look at more classified sections. Half of the good prospects look for jobs under the heading they perceive as Nurses RN.

The detailed facts follow. Tables 13 through 18 can be found on pages 62 through 66.

Like most other people, most nurses report reading[3] the paper regularly, every day of the week. Although there is some variation from Mondays to Fridays, about seven out of ten report that they usually read the paper on the average weekday. On Saturdays the

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3. Because much of the newspaper is scanned, questions asking about newspaper reading are often phrased as "read or looked at", as was done in this study. The same wording was used in this study on two of the questions about employment ads. Although the answers to these questions probably encompass both careful reading and superficial looking, even superficial looking usually includes some reading.

figure drops to 66% and on Sundays it rises to 93%.

The nurses were asked what sections of the newspaper they usually read or look at. Almost all nurses look at the general news (92%). About two out of three nurses report usually looking at or reading each of the following sections: Entertainment, Home, Food, Life-style, Weekend magazine and the classifieds. About half report looking at or reading Business, Fashion, Science, Travel and Careers. Fewer say they read the Sports section.

The differences between good prospects and the other nurses are also illustrated in what they report reading. The good prospects more often report reading either Career or Classified sections; probably because they spend more of their time and effort finding new jobs. However, they are also less likely to report reading the Entertainment section; the Travel section and the Fashion section.

Since people read what they are interested in, the data on what nurses read could also be used for conjectures on the kinds of people they are. Since good prospects are less interested in entertainment, travel and fashion, perhaps they are more down-to--earth people.

49% of the nurses report reading or looking at the classified ads at least once a week; 25% at least several times a week. 82%

usually look at newspaper employment ads on Sundays; 15% to 24% on each of the other days of the week.

As expected, nurses in the job market read or look at classified ads more frequently than those not in the job market. Among the best prospects, 46% look at the classified ads either every day or several times a week. Among all other nurses, the figure is 22%.

To find employment ads, most nurses turn to the classified section. A total of 71% check the careers section either regularly or occasionally. 44% check the business sections.

The best employment prospects seem more diligent in searching for the employment ads. The average good prospect checked 3.3 different sections for employment ads; the average nurse in the group least likely to change jobs checked 2.7 sections.

Within the employment advertising section, the headings under which nurses most often find the ads for nursing jobs are perceived as either Professional, Medical/Dental/Health, Nursing or Nurses RN. 53% of the good prospects look under the heading they perceive as Nurses RN. After that come Medical/Dental/Health (43%) and then Nursing (13%).

TABLE 13

Days of the Week Newspaper Read*
by Likelihood of Changing Jobs

		Likelihood of Changing Jobs			
	Total	Most Likely	May be Looking/ Might Change	Not Thinking/ Might Change	Unlikely t Change
Monday	70%	67%	72%	70%	70%
Tuesday	67	63	67	68	68
Wednesday	72	73	72	75	70
Thursday	70	63	67	70	73
Friday	70	67	65	71	72
Saturday	66	63	65	61	71
Sunday	93	97	97	95	90
Base:	(222)	(30)	(40)	(56)	(96)

* Percentage reading the paper on each day

Question: On what days of the week do you usually read or look at a daily or weekend newspaper?

TABLE 14

Frequency of Reading Classified*
by Likelihood of Changing Jobs

		Likelihood of Changing Jobs			
	Total	Most Likely	May be Looking/ Might Change	Not Thinking/ Might Change	Unlikely t Change
Every day	10%)	23%) 46	13%) 28	9%) 23	6%) 2
Several times a week	15) 49	23)	15)	14)	14)
Once a week	24)	23	32	21	23
Once every couple of weeks	12	10	17	11	11
Once a month	9	7	13	7	9
Once every couple of months or less	29	13	10	38	36
Base:	(222)	(30)	(40)	(56)	(96)

* Percentage who report reading at each frequency

Question: How often do you read or look at the employment ads in the help wanted section of the newspaper?

TABLE 15

Days of Week Classified Ads Read*

by Likelihood of Changing Jobs

			Likelihood of Changing Jobs		
	Total	Most Likely	May be Looking/ Might Change	Not Thinking but Might Change	Unlikely to Change
Monday	17%	23%	20%	16%	15%
Tuesday	15	27	20	13	10
Wednesday	24	47	25	23	17
Thursday	17	30	20	16	11
Friday	19	27	17	20	18
Saturday	23	50	13	23	19
Sunday	82	83	95	82	77
Base:	(222)	(30)	(40)	(56)	(96)

* Percentage reading the classified ads on each day

Question: On what days of the week do you usually read or look at a daily or weekend paper?

TABLE 16

Sections of the Newspaper Read* by Likelihood of Changing Jobs

				Likelihood of Changing Jobs	
	Total	Most Likely	May be Looking/ Might Change	Not Thinking/ Might Change	Unlikely to Change
General News	92%	93%	82%	93%	95%
Local News	90	83	85	95	92
Entertainment	71	57	67	70	77
Lifestyle	69	67	65	75	69
Home	68	67	65	66	71
Weekend Magazine	68	60	75	70	68
Food	66	60	65	66	68
Classified	60	77	65	59	54
Travel	54	43	57	63	50
Fashion	52	37	47	57	55
Science	49	46	50	55	45
Editorial Page	49	43	45	38	59
Careers	48	63	50	43	45
Business	40	40	52	30	41
Other	2	3	0	2	2
Base:	(222)	(30)	(40)	(56)	(96)

*Percentage who report reading each section.

Question: What sections of the newspaper do you usually read or look at?

TABLE 17

Sections of the Newspaper Usually Looked at for Employment Ads* by Likelihood of Changing Jobs

				Likelihood of Changing Jobs	
	Total	Most Likely	May be Looking/ Might Change	Not Thinking/ Might Change	Unlikely to Change
Classified	93%	100%	100%	86%	92%
Careers	48	60	45	41	50
Business	23	20	28	18	25
Local News	8	13	5	11	5
Science	4	13	0	2	3
General News	2	3	0	4	2
Entertainment	2	3	0	2	2
Home	2	3	0	4	2
Sports	0	3	0	0	0
Other	2	3	0	2	3
Base:	(222)	(30)	(40)	(156)	(96)

*Percentage mentioning each section.

Question: Please circle the sections or types of pages you usually look at if and when you are looking for employment ads.

TABLE 18

Other Sections of the Newspaper Looked at for Employment Ads* by Likelihood of Changing Jobs

		Likelihood of Changing Jobs			
	Total	Most Likely	May be Looking/ Might Change	Not Thinking/ Might Change	Unlikely to Change
Careers	23%	17%	17%	29%	25%
Business	21	33	13	23	19
Classified	14	17	20	11	11
Local News	14	23	10	13	15
Science	6	3	0	11	7
Entertainment	2	0	3	2	3
Sports	1	0	0	2	1
Home	1	0	0	4	0
Other	1	0	0	2	1
No others	3	0	3	2	4
Base:	(222)	(30)	(40)	(56)	(96)

*Percentage mentioning each section.

Question: Now, circle only other sections or types of pages you might occasionally look at for employment ads.

3. What Nurses Say They Want in Ads

We asked the nurses to rate the importance of 14 characteristics of newspaper employment ads. The tabulations of their answers are shown in Table 19 on page 68.

Nurses' comments about employment ads correspond well to what they say they want in a job. They focused on the content of the ad. They said they want the ad to tell them what the job is -- the specialty, the qualifications, the shift, the job title, the location and the salary.

Although ad-makers know that responses to ads also depend on the form of the ad -- where it is on the page, the headline, the size of the ad or the graphics used -- it is no surprise that few of the nurses said these characteristics were very important to them.

While there are some differences between the groups of nurses of different employment prospect status, those differences are relatively small and apparently random. Therefore it seems more sensible to talk about all nurses, rather than better and worse employment prospects. In this case it is probably better not to use exact percentages since there are slight variations from group to group. The detailed facts follow.

Four characteristics are of primary importance and mentioned by about the same proportions of nurses across all four prospect groups: nursing specialty, required qualifications and experience, job description, and work shift. Each of these characteristics was mentioned by about seven out of ten nurses. Three other characteristics seem to be second in importance: job location, job title and salary. Each of these was mentioned by five or six out of ten nurses. Three or four out of ten nurses would like to know what type of facility is offering the position and the name of the hospital or employer. The remaining five characteristics were mentioned by only one or two out of every ten nurses: size of ad, headline, position of the ad on the page, graphics/photos/drawings used in the ad and the size of the facility presenting the job.

TABLE 19

Characteristics Wanted in Newspaper Employment Ads*

	Very Important	Intermediate Importance	Not at all Important
Nursing specialty	75%	25%	0%
Required qualifications and experience	73	26	1
Work shift	69	31	0
Job description	68	32	0
Job location	61	38	1
The job title	55	44	1
Salary	53	46	1
Type of facility	40	57	3
The hospital's name or the employer's name	38	59	3
Headline of ad	15	75	10
Hospital/facility size	12	76	12
The size of the ad	11	67	22
Graphics/photos/drawings	8	69	23
The ad's position on the page	7	56	37

* Percentage of nurses who rate each characteristic as either very important, somewhat/not very important, or not at all important. For each characteristic, the base is the total sample (n=222).

Question: How important are the features listed below in attracting your attention to a newspaper employment ad. Please rate each one on whether it is very important, somewhat important, not very important, or not at all important.

4. Blind Ads

The nurses were asked how likely they would be to respond to a "blind" ad (an ad with a box number but not the name of the employer): 32% say that it is not at all likely that they would answer an ad which omits the name. 51% say that it is not very likely. Therefore a total of 83% are not very likely to answer a blind ad. Better employment prospects are only marginally more likely to answer such an ad.

Ad professionals have suggested that the response rate from a blind ad might be improved either by guaranteeing an answer to all who reply to the ad or by guaranteeing that applicants' replies will not be forwarded to whatever employer the applicant indicates. We proposed these two alternatives to those nurses who said they would be not very likely, or not at all likely, to answer a blind ad. 33% of these initial "rejectors" said they would be either somewhat likely or very likely to respond to the ad that guaranteed a response. 25% said the same thing about the ad that guaranteed that their response would not go to whatever facility they listed. Even using the 33% of the rejectors, that accounts for only 27% of all nurses. Subtracting the 27% from the 83% who would be unlikely to respond to a blind ad still leaves 56% of all nurses who would be unlikely to answer the qualified version of the blind ad.

TABLE 20

Nurses' Likelihood of Responding to a Blind Ad

Very likely	3	
Somewhat likely	14	
Not very likely	51)	83
Not at all likely	32)	
	100%	
Base:	(222)	

Question: All other things being equal, how likely would you be to respond to a "blind" ad; that is, an employment ad that does not indicate who the advertiser or employer is?

5. Ad Responses Requested

The advertiser must also consider how the applicants are to respond to the ad: Send a resume? Call? Visit the facility? Request a brochure? Attend an open house? Other alternatives? We asked the nurses how likely they would be to respond to each of eight different requests, all other things being equal. Because this was a rating, the nurse could say that she would respond to all eight or to none or anything in between.

One alternative was clearly preferred to all others: call or visit the facility. 59% said they would be very likely to respond to an ad asking for this action. This result is consistent with their aversion to blind ads. By visiting, they could see the facility.

Four other alternatives were rated as "very likely" to elicit a response by 30% to 40%: call for a free brochure, send a resume, call a job hot-line, and send an application coupon. More of the nurses who were good prospects said they would be very likely to call for a free brochure. There are only marginal differences between good prospects and other nurses for all the other alternatives. Attending an open house was rated as very likely by 19%. 10% said they would be very likely to respond to an invitation to a seminar and 11% said they would be very likely to visit a booth at a job fair.

TABLE 21

Likelihood of Responding to a "Qualified" Blind Ad

	Blind Ad Guarantees a Response[1]		Blind Ad That Guarantees Where Resume Will Not Be Sent[2]	
Very likely	5)	33	5)	24
Somewhat likely	28)		20)	
Not very likely	47		45	
Not at all likely	20		28	
DK/NA	-		2	
	100%		100%	
Base:*	(184)		(184)	

1. Question: All other things being equal, how likely would you be to respond to a "blind" ad that guarantees a response?

2. Question: All other things being equal, how likely would you be to respond to a "blind" ad that guarantees that your resume will not be sent to those hospitals/facilities that you specifically rule out?

* Nurses who report they are not very likely or not at all likely to respond to a blind ad.

TABLE 22

Nurses' Likelihood of Responding to Different Ad* Requests by Likelihood of Changing Jobs

		Likelihood of Changing Jobs			
	Total	Most Likely	May be Looking/ Might Change	Not Looking but Might Change	Unlikely to Change
Call or visit the hospital's/ facility's employment office for more information	59%	60%	55%	63%	59%
Call for free brochure	36	57	28	30	36
Send in a resume	36	50	30	30	39
Mail in an application coupon with ad	31	33	35	30	28
Call a job hotline	27	40	28	21	26
Attend an open house	19	10	22	20	20
Visit a booth at job fair	11	17	10	13	8
Call for invitation to seminar	10	10	8	14	9
Base:	(222)	(30)	(40)	(56)	(96)

* Percentage who say they would respond to each alternative.

Question: If you are looking for employment, with all other things being equal, how likely would you be to respond to an ad asking you to do the following....?

6. Who Interviews the Applicant

In the earlier qualitative study ("Nurses' Attitudes Toward Job Seeking and Recruitment Advertising"), one of the concerns was with who conducts the employment interview. Nurses preferred nurse interviewers. They said that personnel interviewers often didn't know enough to answer their questions. The same attitudes surfaced in this study.

We asked the nurses to rate the qualifications of four different kinds of interviewers: nurse recruiter in the personnel department; nurse recruiter in the nursing department; personnel department employment interviewer and unit nursing supervisor. A five point scale was used, and, as before, the respondent could rate all or none of the interviewers as best qualified.

68% said that the unit nursing supervisor was the best qualified (scale position 5). 48% rated the nurse recruiter in the nursing department as best qualified. Only 5% of the nurses were willing to so rate the nurse recruiter in the personnel department and only 1% the personnel department employment interviewer. There were no major differences in attitudes between those who are good employment prospects and those who are not good employment prospects.

TABLE 23

Nurses' Ratings of Interviewers' Qualifications

	RATING					
	Not Qualified				Best Qualified	
	1	2	3	4	5	DK/NA
Unit Nursing Supervisor	1%	4%	6%	19%	68%	1%
Nurse Recruiter--Nursing Department	1	1	11	39	48	1
Nurse Recruiter--Personnel Department*	9	18	42	24	5	1
Personnel Department Employment Interviewer	30	34	28	6	1	1

* For each row base is the total sample (n = 222)

Question: If you were to be interviewed, how qualified would you consider a person in each of these positions to be, in terms of his or her ability to interview you? Use any number from 1 to 5 to answer, where a "1" means not qualified, and a "5" means best qualified.

V. OVERVIEW

It is clear that many nurses anticipate changing employment in the near future. As employers are seeking nurses, so nurses are seeking new employers. It is also clear that nurses prefer certain employment benefits over others and there are differences among nurses in who prefers what benefits. For instance, compared to those unlikely to change employment, more of those actively seeking new positions prefer opportunities for clinical advancement. Nurses know what they want in a new job and what they would avoid. Nurses also have clear preferences among alternative procedures for finding a new position: the sources of information most used; the information they want in ads; their preferences in how to respond to advertising and even the personnel by whom they prefer to be interviewed at the employer's organization.

Successful Recruitment of Computer Professionals

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
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SUCCESSFUL RECRUITMENT OF COMPUTER PROFESSIONALS

March 1988

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CONTENTS

Page

LIST OF TABLES.......... v
INTRODUCTION.......... vii
HIGHLIGHTS.......... xi

FINDINGS:.......... 1
- A. Identification of Recruitment Prospects.......... 1
  - 1. How Many Are Likely To Change Jobs?.......... 1
    - a. Number Who Are Looking For A Job Now.......... 1
    - b. Likelihood of Changing Jobs.......... 2
  - 2. How Often Do They Usually Change Jobs?.......... 2
  - 3. Definition of "Hot", "Lukewarm" and "Longshot" Prospects.......... 5
  - 4. How do the Prospect Groups Differ?.......... 6
    - a. Satisfaction with Current Job Key Difference.......... 6
    - b. Prospect Group Status Not Related to.......... Experience or Specialty.......... 7
- B. Importance of Job Features in Assessing Employment Opportunities.......... 9
  - 1. General Observations.......... 13
  - 2. Detailed Examination of Features.......... 14
    - a. Job Satisfaction.......... 15
    - b. Salary and Benefits.......... 17
    - c. Product/Company Variables.......... 18
    - d. Other Factors in the Decision Process.......... 19
- C. How Prospects/Demographic Groups Differ in Job Selection Criteria.......... 21
  - 1. Relocation.......... 21
  - 2. Features Looked for in a Job.......... 22
  - 3. Demographic Differences.......... 27
  - 4. Summary and Implications.......... 27
- D. Relocation.......... 30
  - 1. Willingness to Relocate.......... 30
  - 2. Factors in Accepting a Relocation Job.......... 31
    - a. Minimization of Financial Risk/Loss.......... 36
    - b. Family Considerations and Relocation.......... 38
    - c. Career Development and Relocation.......... 40
    - d. Good/Improved Quality of Life.......... 41
    - e. Location Variables.......... 42
    - f. Spouse Employment.......... 43
  - 3. Conclusions About Relocation Job Criteria.......... 43
  - 4. How Prospects Differ in Relocation Criteria.......... 44
  - 5. Most Desirable/Least Desirable Destinations.......... 45
- E. Looking for a Job.......... 49
  - 1. Sources of Information.......... 49
  - 2. Most Important Source of Information.......... 52
  - 3. How Computer Professionals Use the Newspaper.......... 54

CONTENTS (Continued)

Page

4. What Makes Them Notice Particular Employment Ads?......... 62
    a. Essential/Screening Information..................... 62
    b. Ad Features... 64
    c. Hot Prospects Want More Definite Information......... 65
5. Will They Respond to Your Ad?............................ 66
    a. Best Bet: Direct Contact With Hiring Department...... 66
    b. Less Effective: Personnel Department Contacts....,... 67
    c. Least Effective: Mass Recruitment/Impersonal Techniques.. 69
    d. Blind Ads: Avoid Whenever Possible.................. 69
6. Summary... 70

SUMMARY AND RECOMMENDATIONS................................ 73
APPENDIX: Selected Tables.................................. 79

LIST OF TABLES

Page

1. Two Measures of Job Mobility by Age of Respondent.......... 4
2. Demographic Profile of Computer Professionals by Prospect Status.. 8
3. Features Most Often Looked For In A Job.................... 10
4. Most Important Features In A Job........................... 11
5. Reasons for Rejecting Potential Employment................ 12
6. Features Most Often Looked For In A Job (Prospect Groups).. 24
7. Most Important Features In A Job (Prospect Groups)......... 25
8. Reasons For Rejecting Potential Employment (Prospect Groups)... 26
9. Features Important to Accepting a Job Offer Involving Relocation... 33
10. Features Important to Accepting A Job Offer Involving Relocation (Prospect Groups)......................... 34-35
11. Most and Least Preferred States for Relocation............ 47-48
12. Usefulness of Employment Information Sources.............. 51
13. Single Source of Job Information Used Most Often.......... 53
14. Days of Week Newspaper Usually Read....................... 55
15. Frequency of Newspaper Employment Ad Reading in Help Wanted Section..................................... 57
16. Newspaper Employment Listings Consulted in a Job Search.... 59
17. Sections of the Newspaper Consulted for Employment Advertising.. 60
18. Sections of Newspaper Usually Read........................ 61
19. Features Attracting Attention to Ad........................ 63
20. Response to Employment Ads................................ 68

LIST OF TABLES (Continued)

Page

21. Satisfaction With Current Employer.......................... 79

22. Marital Status of Respondents.............................. 80

23. Occupation of Spouse....................................... 80

24. Number of Children in Household Under the Age of 18......... 80

25. Sex of Respondents... 80

26. Age of Respondents... 81

27. Number of Persons in Household............................. 81

28. Annual Salary.. 82

29. Total Gross 1984 Household Income.......................... 83

30. Number of Years Employed in the Computer Science/Computer Engineering Field..................................... 84

31. Area of Specialization..................................... 84

INTRODUCTION

The computer industry has a problem. Regardless of which projections one looks at and/or believes, the demand for experienced, well educated computer professionals is going to increase dramatically over the next ten to fifteen years. According to the Labor Department's 1986-87 Occupational Outlook Handbook, the total number of positions both for computer programmers and for software analysts will increase 70% by the year 1996, and other computer-related occupations are expected to increase hiring at dramatically high rates as well (reported in MIS Week, April 28, 1986, p. 60).

Severe shortages are predicted in the more complex and challenging areas of the computer industry (including telecommunications, aerospace, military, software programming and applications programming) rather than in "routine" programming areas, where demand may actually decrease during the next ten years (MIS Week, August 18, 1986, p. 45).

Unfortunately, while demand is increasing, interest in computer-related professions among college students is dropping off. A recent article in the Wall Street Journal ("Jobs Go Unfilled as Fewer Students Show Interest in Computer Science", November 27, 1987, p. 13) noted that the number of college freshmen aspiring to computer programming and analyst careers decreased by half between 1982 and 1986 (from 8.8% of all freshmen to 3.5%). Some reasons for decreased interest reportedly include diminished expectations about salaries in the industry, heightened awareness of the "unstable" conditions of the industry, (particularly after the 1984-85 "slump") and the decreased "glamour" of the field.

Further, major recruiters are already reporting difficulties not only in attracting but also in retaining qualified personnel. Edward Perlin Associate's 1986 Salary Survey of Data Processing Professional Positions reported annual DP staff turnover at 17% (down slightly from 18% in 1985).

In the face of increasing competition for a smaller pool of qualified workers, companies employing computer professionals must evaluate their current recruitment/hiring practices and take steps to enhance competitive position now. That evaluation means looking at measures to improve the overall image of the industry (PR), recruitment and retention procedures.

The Purpose of this Study

The purpose of the quantitative study reported here was to investigate what computer professionals want in a job, what incentives would motivate them to relocate, and how these professionals go about finding a job. The survey was designed to follow up qualitative research conducted in 1983 for the Newspaper Advertising Bureau by Blanka Epstein of Social Science Applications. That study identified a number of major issues, which were probed in detail in the current study.

Method of the Study

Computer professionals were randomly selected from a national list of computer scientists and engineers and screened by telephone for eligibility to participate in the study. Eligibility qualifications included: a minimum of two years college training, a minimum of two years working experience in the computer science field, a software-based specialty (self-classified as "programmer", "system analyst", "systems consultant", "software applications specialist", "systems programmer", etc.) and a minimum age of 21. Telephone screening was conducted between September 30 and October 21, 1985, by Response Analysis Corporation.

A total of 168 qualified computer professionals agreed to participate in the study (a self-administered mail questionnaire).* The questionnaires were mailed by Response Analysis shortly after telephone screening, with a remailing sent to those who did not respond within two weeks. A total of 137 usable questionnaires were received, for a response rate of 82%.

Leon Aron, Michael Macht and Stuart Tolley (all of NAB) and Blanka Eckstein of Social Science Applications were jointly responsible for study design and questionnaire construction. Ann Miksovic of Response Analysis Corporation supervised the field and tabulation work and contributed to the questionnaire design and pre-testing.

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*A copy of the questionnaire used in this study can be obtained by writing to NAB's Research Department.

For support and help throughout the study, thanks are also due to Ira Gordon (NAB), and to an ANCAM (Association of Newspaper Classified Advertising Managers) task force consisting of Jim Roberts of the Chicago Tribune, Jack Ross of the Philadelphia Inquirer, and Gail Hyland of the Los Angeles Times.

Dorothy Shea of NAB's research department carried out the data analysis and wrote this report.

HIGHLIGHTS

This study makes two contributions to the body of knowledge concerned with recruitment and retention of experienced computer professionals. First, the findings confirm the hypothesis that a large percentage of computer professionals would consider leaving their current employer for a new job. This finding underscores the need to evaluate and/or improve retention as well as recruitment programs. Second, the study identifies factors which could be incorporated into such a recruitment/retention program, based on the specialized characteristics and needs of computer professionals.

1. While the majority (61%) say they are very satisfied with their current jobs, more than four in ten would consider taking a new position (11% actively looking for a new job, 32% thinking of looking). Further, most computer professionals are not averse to relocating for the right opportunity.

2. Those most likely to change jobs, Hot Prospects (22% of the sample), are significantly less likely to be satisfied with their current employer and more likely to consider relocating than are Lukewarm Prospects (37% of the sample), or Longshot Prospects (41%). The likelihood of being a Hot, Lukewarm or Longshot prospect cannot be adequately predicted by specialty, years of experience or demography.

3. When looking for a job, computer professionals appear to evaluate potential opportunities primarily on the basis of job satisfaction/ career enhancement features, salary and related benefits, product/ company integrity, and "other" factors.

   Of those feature categories, job satisfaction variables are clearly the most important. These include challenging work, opportunity for advancement, recognition by superiors and high caliber colleagues. Competitive salary is also extremely important.

4. When relocation is involved, however, the issues of financial risk and family often supercede job satisfaction/career enhancement. These issues create a "threshold" which must be crossed before computer professionals will seriously consider the job. Among these concerns are relocation assistance (such as paying moving expenses), same/better quality of housing, spouse's attitude toward relocation, good schools for children and a substantial salary increase.

5. In many cases, Hot Prospects and those more favorable toward relocation expressed lower levels of concern about the risks inherent in a relocation job.

6. Personal contacts are the most frequently used source of new job information, followed by newspaper employment ads and trade

journals. Hot Prospects were less likely to report using personal networks and more likely to report using newspaper ads than Lukewarms or Longshots.

7. Nearly half (45%) of the Hot Prospects reported reading newspaper classifieds at least once a week, compared to 22% of the Lukewarms and 24% of the Longhots.

8. Sunday placement of newspaper classified ads is essential, since nine in ten computer professionals read the ads on that day.

9. The majority checks the business section as well as the classifieds for job information. Some also read Careers or Science for employment opportunities.

10. Computer professionals want "nuts and bolts" information in employment ads: a thorough job description, qualifications and job location. Without these items, ad size and style will not be sufficient to attract attention.

11. Ads which ask the potential candidate to contact the hiring department directly are most likely to generate good responses. Fewer will respond to the personnel department, even when a specific contact is given.

FINDINGS

A. IDENTIFICATION OF RECRUITMENT PROSPECTS

1. How Many Are Likely To Change Jobs?

Computer professionals were asked a series of three questions designed to measure their interest in/expectations of changing jobs. These questions were structured so that immediate as well as "long term" (defined as a one year period) job change potential might be detected. The answers to the three questions were later combined to create "prospect" groups for use in the analysis.

a. Number Who Are Looking For A Job Now

Initially, computer professionals were asked whether or not they were actively seeking a new job at the time of the survey ("Are you actually looking for a job with another employer now?"). Of the 137 individuals responding, only 11% (15 respondents) reported an active search in process.

While the vast majority (89%, 122 respondents) indicated they were not actively seeking new employment, a third of those 122 "inactive" prospects (36%) conceded that they were thinking about looking for a new job. This means that a fairly large proportion of the sample (43%) was open to the possibility of changing jobs.

b. Likelihood of Changing Jobs

Despite the fact that many would consider changing jobs, fewer computer professionals expected they would actually make a change. When asked: "Realistically, how likely is it that you will change employers in the next year or so?", less than one quarter said it was "very likely" (4%) or "somewhat likely" (18%) that they would do so. Another third (32%) said they "might or might not" change jobs within the year, and the balance (46%) considered it "not at all likely" that they would change jobs.

2. How Often Do They Usually Change Jobs?

While there is a good deal of disagreement among recruitment professionals regarding how frequently computer professionals change jobs in general, the data from the current survey suggests that our respondents were not individuals who change jobs frequently. Apparently they do not take job changes lightly. We asked them two questions to clarify this issue.

First, we asked them how long they have been with their current employer. In general, the respondents reported long relationships with their current employers, even when differences in age (and experience) were taken into account (see Table 1). Even among the youngest computer professionals (age 34 or younger), nearly six in ten indicated they have been with their company for at least five years. Those who are older (and more experienced) reported even longer stays; 86% of the 35-45 year old group and 87% of those 46 or older have been with their company at least five years. Note that the percentage reporting 10+ years of service to the current employer increases dramatically and significantly[1] with age.

Second, we asked them how many job changes they had made throughout their entire careers. Consistant with the data reported above, relatively few job changes were reported by the respondents in each age group (Table 1). Only about four in ten of those in both the 35-45 age group (39%) and the 46 and older group (43%) have made two or more changes in employer. As would be expected, the youngest group was less likely to have made even one job change.

In interpreting these findings it is important to note that some recruitment professionals feel turnover rates may be on the rise. Compared to 1985, when this survey was conducted, the current marketplace is viewed as less stable overall and more frequent job changes are required for salary and career enhancement.

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[1] As used in this report, "significant difference" stands for a difference large enough to be statistically significant at the .95 level. That means the difference is not likely to be a result of sampling variation and very likely to be true in the population sampled. For this relationship, the Chi-Square value of 40.1 (df=4; p<.001) is significant.

Table 1

Two Measures of Job Mobility by Age of Respondent

		Age 34 or Younger	Ages 35 - 45	Age 46 or Older
Years with Current Employer*				
1 - 4		43%	14%	13%
5 - 9		51	42	6
10+		6	44	81
		100%	100%	100%
Total Job Changes**				
None		47%	31%	38%
One		35	30	19
Two or more		18	39	43
		100%	100%	100%
Base	(N) =	(49)	(71)	(16)

* Question: For how long have you been with current employer?

**Question: During the time you have been working as a computer scientist/engineer, how many times, if at all, have you left one company to take a job with another company?

3. Definition of "Hot", "Lukewarm" and "Longshot" Prospects

Computer professionals responding to the survey were split into three groups, based on their responses to the three job change questions. This was done to identify salient differences, if any, between individuals who are more and less likely to respond to recruitment advertising.

Those most likely to change jobs ("Hot" Prospects) were defined as computer professionals who were either actively looking for a new job or thinking about looking for a new job and who said it was "very" or "somewhat" likely that they actually would change jobs within the next year. This group included 29 individuals (22% of the survey sample).

Conversely, "Longshots" (those least likely to change jobs) were defined as computer professionals who said they were neither looking nor thinking of looking for a new job and who said it was "not at all likely" that they would in fact change jobs in the next year. Longshots accounted for 41% of all respondents to the survey.

"Lukewarm" prospects (those who might or might not change jobs), in contrast to the more extreme Hot Prospects and Longshots, were defined as those who gave mixed answers to the three job change questions. For example, an individual who said he/she was thinking about a job change but said it was "not at all likely" that he/she would actually change jobs was considered a "Lukewarm" prospect. Similarly, the person who said he/she was not thinking about changing jobs but was "somewhat likely" to make a change was also classified as Lukewarm. This "mixed" group included 37% of all respondents to the survey.

4. How do the Prospect Groups Differ?

a. Satisfaction with Current Employer is a Key Difference

In order to assess levels of motivation for changing jobs, computer professionals were asked to rate their satisfaction with their current employer "on an overall basis". A scale of one-to-ten was utilized, where "10" meant the individual was extremely satisfied with his current employer and a "1" meant he was extremely dissatisfied.

Overall, it is fair to conclude that computer professionals as a group are fairly satisfied with their current jobs, as 61% rated them very highly (an 8, 9 or 10). Conversely, only 4% said they were very dissatisfied (a rating of 3) and no one said he was "extremely dissatisfied" (a rating of 1 or 2) with his current employer. (The balance--35%--fall in the middle.) (See Appendix Table 21)

It is not surprising, however, that significant differences were observed in terms of satisfaction levels of the three prospect groups. Hot Prospects were much less likely to rate their employer highly (24%) than Lukewarm prospects (57%), who were, in turn, much less likely to indicate high levels of satisfaction than Longshots (84%).

b. Prospect Group Status Not Related to Demography, Experience or Specialty

While we might expect younger, better educated, and perhaps single respondents to be more strongly represented in the Hot prospect group, that was not the case. No significant differences in demography[1] were observed, as Table 2 shows. Some variations in age seem to be marginally important but do not sharply differentiate the three prospect groups.

Further, neither the amount of professional experience nor the computer professional's specialty was correlated with interest in or likelihood of changing jobs.

These data suggest that an interest in changing jobs is the result of individual dissatisfaction with the current employer, aspects of the position or perhaps the computer professional's specialty rather than of demographic characteristics (employment stages or cycles). Possible sources of job dissatisfaction will be discussed in the next section.

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[1] Large numerical differences (+/_ 25 percentage points) are needed to constitute statistically "significant" differences. Additional details on the personal and occupational background of the sample of computer professionals are provided in Appendix Tables 22-31.

Table 2

Demographic Profile of Computer Professionals by Prospect Status

	Total	Hot Prospects	Lukewarm Prospects	Longshots
Age				
24 or younger	2%	3%	-	4%
25-34	34	38	41%	25
35-45	52	45	49	59
46-50	7	7	6	7
51+	5	7	4	5
	100%	100%	100%	100%
Sex				
Male	85%	83%	84%	86%
Female	15	17	16	14
	100%	100%	100%	100%
Marital Status				
Married	72%	62%	73%	75%
Not Married (Single/Divorced/Separated/Widowed)	28	38	27	25
	100%	100%	100%	100%
Education				
Two Years of College/Associate Degree	5%	-	4%	9%
Four Year College Graduate	29	31%	29	28
Graduate Work/Degree	66	69	67	63
	100%	100%	100%	100%
Base (N) =	(135)	(29)	(51)	(57)

B. IMPORTANCE OF JOB FEATURES IN ASSESSING EMPLOYMENT OPPORTUNITIES

In order to identify job features which might either increase or decrease their interest in a professional opportunity, computer professionals were asked a series of three questions about the importance of particular job features in an employment decision. First, computer professionals rated twenty-three job features in terms of how important they are when looking for a job. A one-to-ten rating scale was utilized, where "10" meant that the feature was 'absolutely essential' while a "1" signified that it was 'of no importance whatsoever'. (See Table 3).

Second, respondents were asked to identify which three of the 23 items they rated initially represented their first, second and third "most important" criteria in evaluating job opportunities. (See Table 4).

Finally, computer professionals rated fourteen possible reasons for rejecting a job opportunity in terms of how frequently they would reject a job for that reason. For this question a 10-point scale was again used, but in this case a "10" meant the individual would 'always' reject a job with that feature while "1" meant he/she would 'never' reject a job for that reason. (See Table 5).

Table 3

Features Most Often Looked For In A Job*

	High, Essential (8, 9, 10)	Moderate Importance (4 - 7)	Little/No Importance (1, 2, 3)
Challenging Work	85%	15%	0%
Company Integrity	80	19	1
Opportunities for Advancement	73	26	1
Competitive Salary	71	28	1
High-caliber Co-workers	62	38	0
Recognition by Superiors	62	37	1
Medical Benefits	62	34	4
State-of-the-art Technology	53	43	4
Product Integrity	53	46	1
Good office Atmosphere	52	46	2
Job Stability	50	45	5
City or Metropolitan Area in Which Job is Located	50	42	8
Comfortable Commute	44	48	8
Pension Plan	35	52	13
Company Reputation in the Field	35	54	11
Office Privacy	32	59	9
Dental Care Benefits	32	54	14
Flexible Work Schedule	32	60	8
Assistance with Continuing Education	18	55	27
Bonuses	16	57	27
Stock Options	15	51	34
Profit-sharing	14	52	34
Fringe Benefits Other Than Income or Health	14	68	18

Base (137)

*Question: The list above contains a number of features that people like yourself often look for in a job. Please rate each one in terms of how important it is to you when looking for a job or when considering a new job. Use a scale from 1 to 10 when rating each item, where "1" means this job feature is of no importance to you whatsoever, "5" means it is moderately important, and "10" means it is absolutely essential. Use any number from 1 to 10, corresponding to the degree to which the feature is important to you.

Table 4

Most Important Features in a Job*

	Total Mentions	Selecting as Most Important	Selecting as Second Most Important	Selecting as Third Most Important
Challenging Work	57%	36%	14%	7%
Competitive Salary	42	14	14	14
Opportunities for Advancement	34	9	12	13
Company Integrity	28	15	7	6
High-caliber Co-workers	27	5	15	7
City or Metropolitan Area in Which Job is Located	25	7	12	6
Recognition by Superiors	15	0	4	11
Medical Benefits	13	1	4	8
Job Stability	12	4	3	5
Good Office Atmosphere	11	4	2	5
Product Integrity	8	1	5	2
State-of-the-art Technology	7	2	0	5
Flexible Work Schedule	7	2	1	4
Comfortable Commute	4	1	1	2
Company Reputation in the Field	4	0	2	2
Office Privacy	2	0	2	0
Profit-sharing	1	0	0	1
Stock Options	1	0	0	1
Dental Care Benefits	1	0	0	1
Fringe Benefits Other Than Income or Health	1	0	0	1
Pension Plan	1	0	0	1
Bonuses	0	0	0	0
Assistance with Continuing Education	0	0	0	0
Base	(137)			

*Question: Please...select the three items that are most important to you and put a "1" next to the most important feature, a "2" next to the second most important feature, and a "3" next to the third most important feature. Only rank three features.

Table 5

Reasons For Rejecting Potential Employment*

	Would Always/ Likely to Reject the Job (8, 9, 10)	Might Not Reject the Job (4 - 7)	Would Never/ Unlikely to Reject the Job (1, 2, 3)
Company Provides an Inferior Product or Service	77%	21%	2%
Layoffs Too Likely	69	24	7
Management Not People-oriented	57	39	4
Company Undercapitalized/Poor R&D Funding	53	39	8
Routine Work Projects	51	42	7
City or Metropolitan Area in Which Job is Located	38	52	10
Somewhat Lower Than Competitive Salary Level	37	59	4
Insufficient Benefits	36	58	6
Uncomfortable Commute	36	55	9
Relocation Necessary	34	39	27
Interviewer Made Poor Impression	31	54	15
Not Using State-of-the-art Techniques/Technology	26	67	7
Company Too Small	11	46	43
Company Too Large	5	46	49
Base (137)			

*Question: People reject potential opportunities for a number of reasons. Please rate each of the factors listed in terms of how likely you would be to reject potential employment because of that factor. Use the 10-point scale to rate each item -- the higher the number, the more likely you would be to reject the job.

1. General Observations

As a group, computer professionals want to work at a challenging job in a stimulating and rewarding environment, and they expect to be well compensated for their work. As Table 3 shows, the vast majority (85%) rate challenging work as an essential/very important feature of potential employment, followed closely by company integrity (80%), opportunities for advancement (73%) and competitive salary (71%). Recognition by superiors (62%), high caliber co-workers (62%), medical benefits (62%) and state-of-the-art technology (53%) were other job/compensation features rated highly by more than half of the respondents. Note that these findings closely correspond with features found important in the earlier qualitative research conducted by the Newspaper Advertising Bureau (Job Search and Recruitment Advertising Study, 1983).

High expectations of employers are also revealed through an examination of which features were not rated as essential, however. Note that many of the benefits, such as pension plan, dental and flexible working schedule (Table 3), were rated as "moderately" important by the majority of the respondents rather than "essential". Hardly anyone rated those features of little or no importance, however. Since the respondents to this survey were fairly experienced, it seems likely that computer professionals expect to be offered a generous benefits package, as has been their experience. They are then free to select among potential employers on the basis of "career enhancement/satisfaction" features which they perceive as beneficial to their career goals.

As evidence for that notion, note that computer professionals were more likely to reject a job opportunity on the basis of inferior product quality (77%), instability/layoffs (69%), poor management (57%), and so on, than on the basis of a "somewhat lower than competitive salary level" (37%) or "insufficient benefits" (36%). (See Table 5)

2. Detailed Examination of Features

In order to obtain a better feel for the types of features computer professionals look for, the correlation matrix was inspected. Several general concepts emerged:

- job satisfaction variables
- salary and benefits variables
- company/product variables
- "other" features

As would be expected, the variables within each grouping showed moderate to strong correlations while not correlating with variables in other groups, indicating that respondents did in fact think of these variables as groupings.

a. Job Satisfaction

Features that make a clear contribution to overall job satisfaction are extremely important to computer professionals when they look for a job. These include challenging work, opportunities for advancement, recognition from superiors, the presence of high-caliber co-workers and use of state-of-the-art technology. (Note that job satisfaction variables appear predominantly in the "top five" ranked features of both Tables 3 and 4.)

Of these features, challenging work stands out as the most important variable; more than eight in ten respondents (85%) called challenging work an essential feature. While a few computer professionals rated challenging work as moderately important (15%), no one said it was unimportant. In addition, challenging work was the most frequently mentioned of all job features as being first, second or third most important feature looked for. (See Table 4).

The desirability of challenging work is further indicated by the finding that half (51%) would always/very often reject a job with too many "routine" work projects. (See Table 5)

Job satisfaction is enhanced when real opportunities for advancement (rated essential/very important by 73%) and recognition from superiors (62%) are present in the workplace. Note that a third (34%) said opportunity for advancement was his/her first, second or third most important job criterion. Similarly, the majority (57%) would always/very often reject an employer who does not seem to be "people-oriented" (See Table 5).

From a recruitment standpoint, it is essential that the company can demonstrate its commitment to recognizing excellence in its workers and promoting from within. As we saw earlier, many computer professionals do not make a job change lightly, and may stay with a chosen employer for a significant portion of his/her career provided, we must assume, with ample promotion and recognition potential.

The degree to which a job environment is sophisticated and stimulating also adds to job satisfaction. Computer professionals value the presence of high caliber co-workers (rated essential/very important by 62%), who might be expected to provide both competition and good ideas for development.

Similarly, half (53%) said that availability/use of state-of-the-art technology is an extremely important feature looked for in a job. While just a quarter (26%) said they would reject a job which did not feature state-of-the-art technology, fully half (53%) would reject a job when the company is not dedicated to development and innovation ("company undercapitalized/poor R&D funding"). These data suggest that computer professionals are looking for a company that appreciates and supports their contributions, not only through salary and advancement, but also through adequate program support.

b. Salary and Benefits

Competitive salary, considered essential/very important in a new job by seven in ten (71%), is clearly the most important remuneration feature an employer can offer computer professionals. While it ranked slightly lower overall than challenging work, company integrity and opportunity for advancement (See Table 3), it seems likely that the lack of a competitive salary would greatly diminish the attractiveness of those other features (and, in fact, 37% said they would always reject a job that offered "somewhat lower than competitive salary"). Salary, as opposed to some other, less tangible features, is a concrete indication of the worth of the individual and his/her job contribution to the employer. Thus, the fact that competitive salary was more frequently named as a first, second or third "most important" feature than any other except challenging work (by 42% of the survey respondents) is not surprising.

Like everyone else, computer professionals expect to receive medical benefits as part of their payment for doing the job. Good medical benefits can be harder to come by, which may explain why more than six in ten (62%) called medical benefits an essential/very important feature in a new job opportunity. Further, many would reject a job that offered "insufficient benefits" (36%). Still, few (13%) indicated that medical benefits would be one of their top three considerations in seeking a new job. (See Table 4)

The only other "benefits" (in addition to salary and medical) which appear to be highly important to a large number of the computer professionals surveyed are pension (essential to 35%) and dental care (essential to 32%). Bonuses, stock options, "fringe benefits" and profit sharing were all cited by less than 20% as essentials. However, in each case, the majority of respondents did consider these benefits moderately important, and we would certainly expect them to compare the "packages" offered by various employers in a job search situation. (As indicated earlier, experienced computer professionals expect a good package.)

Interestingly, job stability, considered essential by half (50%), was positively correlated with most of the benefits features as well as with challenging work and company integrity. This finding suggests that a good salary/benefits package is considered one sign that the company is financially secure and committed to its employees. That is, the company which is willing to extend itself for the betterment of its employees offers a more stable environment and is a better "risk" for job seekers than one which cuts corners in that area.

c. Product/Company Variables

Computer professionals value the quality of the company and its product(s) highly when looking for a job. Company integrity, which might be construed as a measure of the company's financial stability, ethical orientation and so on, was called essential by 80% of all survey respondents (second only to challenging work).

Product integrity, at first glance, appears to be less important to computer professionals, since only about half rated it an essential job feature (53%). However, product/service inferiority was the number one reason cited for rejecting a job opportunity. Nearly eight of ten computer professionals (77%) would always/very likely reject a job with a company that "provides an inferior product or service". Perhaps the difference can be explained in terms of what the computer professional can bring to the job...is the product/service salvagable through the computer professional's efforts, or is management supporting a lost cause? If the product/service can be improved/marketable (with management backing), the job could be extremely challenging and rewarding!

This notion is supported by the fact that current company reputation in the field was considered less important than company or product integrity as a criterion for selecting a job. Only a third (35%) rated company reputation as an essential feature (compared to 80% for company integrity and 53% for product integrity), and few (4%) cited it as a first, second or third most important feature to look for. Still, the majority (54%) indicated that company reputation was somewhat important.

d. Other Factors in the Decision Process

In evaluating different employment opportunities, there are a number of "intangible" features that come into play which may or may not be clearly tied to the job or the company. Included in this grouping are good office atmosphere, flexible working schedules, office privacy and willingness to assist in continuing education. Also included are such factors as length/comfort of the commute to work and, obviously, the city where the job is located.

Good office atmosphere is clearly an important feature, considered essential/very important by half (52%) and of moderate importance to nearly as many (46%). (Only 2% said it was of little or no importance.)

There is some indication, from the ratings of other features, that an environment responsive to the needs of computer professionals will be considered desirable. Flexible scheduling, rated essential/very important by a third (32%), may also be a factor here, as is office privacy (essential/very important to 32%).

The company's interviewer, as the official representative and as the only source of clues regarding how the office "really functions" is of vital importance in communicating the personality of the firm. There was some tendency for individuals who rated good office atmosphere and privacy highly to reject jobs because the interviewer "made a poor impression", particularly among those who are not favorably inclined toward relocation.

C. HOW PROSPECTS/DEMOGRAPHIC GROUPS DIFFER IN JOB SELECTION CRITERIA

In this section differences between Hot, Lukewarm and Longshot prospects are considered in terms of what they are looking for in a job, why they might reject a potential opportunity, and how that could impact on recruitment strategy and tactics. In general, Hot Prospects do not differ markedly from others in their ratings of most features.

1. Relocation

The primary difference between Hot, Lukewarm and Longshot prospects is that Hot Prospects are more willing to relocate than other prospect groups, which is good news for recruiters. Only 17% of the Hot Prospects indicated they would always or usually reject a job opportunity requiring relocation, compared to 33% of the Lukewarm prospects and 44% of the Longshots (See Table 8). Not surprisingly, the data analysis also showed that those willing to relocate were much less likely than others to reject a job because of its location (26% compared to 63% would always/usually reject), or an uncomfortable commute (29% compared to 52%). (Recall also that those who are willing to relocate tended to be less concerned about the location of the job and commuting comfort.)

In interpreting these data it is important to note that the majority (66%) of all computer professionals surveyed would consider a job involving relocation. Still, as a group they aren't ready to go just anywhere - half said the city or metropolitan area where the job was located is an essential factor to consider, and one quarter cited location as one of their top three criteria.

2. Features Looked For in a Job

Overall, there was some tendency among Hot Prospects to value medical benefits and good office atmosphere more than other prospect groups and to value typical job satisfaction features (such as challenging work and competitive salary) less. Ratings for the importance of job stability and company reputation in the field were also lower than those of Lukewarms or Longshots. These differences were not statistically significant, however. (See Table 6)

In terms of the top features looked for in a job (See Table 7), the only difference between Hot, Lukewarm and Longshot prospects which approached statistical significance was the importance of advancement potential, and here again relocation appears to be a factor. Forty-three percent of the Hot Prospects indicated that advancement potential was one of their top three criteria, compared to 37% of the Lukewarms and 23% of the Longshots. Among those willing to relocate (which is a group with a disproportionate number of Hot Prospects), 40% cited advancement potential as a top three criterion compared to only 18% of those less willing to relocate.

Hot Prospects, further. tended to select challenging work and high caliber co-workers as top criteria less frequently than other prospect groups, but again the differences were not statistically significant.

By contrast, Longshots selected competitive salary less frequently and company integrity more frequently as top three criteria than others. These data suggest a simple reason for their status as Longshots: they like their current companies and are not easily moved by offers of more money.

With respect to reasons for rejecting jobs, these differences among the prospect groups were observed: Hot Prospects were slightly more likely to reject a job because management is not people-oriented, but less likely to reject a job because the company is undercapitalized. As mentioned previously, they were also less likely to reject a job on the basis of relocation or the city where the job is located. (See Table 8)

Lukewarms, on the other hand, tended to be more likely to reject a job with too many routine work projects and less likely to be concerned with commuting comfort.

Finally, Longshots tended to be the most concerned with layoffs, the least favorable toward relocation and the least concerned about benefits offered by a company.

Table 6 - Features Most Often Looked For In A Job (Prospect Groups)*

	Total**	Hot Prospects	Lukewarm Prospects	Longshots	Would Consider Relocation	Would Not Consider Relocation
Challenging Work	86%	79%	84%	91%	87%	85%
Company Integrity	80	76	78	84	78	85
Opportunities for Advancement	73	76	78	68	75	70
Competitive Salary	71	62	76	71	72	70
Recognition by Superiors	63	59	70	59	62	65
High-caliber Co-Workers	63	52	68	64	64	61
Medical Benefits	62	69	66	54	62	61
Product Integrity	53	45	52	59	55	50
Good Office Atmosphere	53	62	56	45	51	57
State-of-the-art Technology	53	55	48	57	54	52
Job Stability	50	41	54	52	45	61
City or Metropolitan Area Where Job is Located	50	38	40	66	43	65
Comfortable Commute	44	41	36	54	35	63
Company Reputation in the Field	36	28	32	43	40	26
Pension Plan	36	35	36	36	33	41
Flexible Work Schedule	33	24	30	39	32	35
Dental Care Benefits	33	21	36	36	33	33
Office Privacy	33	28	32	36	29	39
Assistance With Continuing Education	19	14	24	16	20	15
Bonuses	16	14	20	14	15	20
Stock Options	16	3	28	11	16	15
Fringe Benefits Other Than Income or Health	14	10	20	11	16	11
Profit Sharing	14	10	20	11	16	11
***Base	(135)	(29)	(50)	(56)	(89)	(46)

*Question: The list contains a number of features that people like yourself often look for in a job. Please rate each one in terms of how important it is to you when looking for a job or when considering a new job. Use a scale from 1 to 10 when rating each item, where "1" means this job feature is of no importance to you whatsoever, "5" means it is moderately important, and "10" means it is absolutely essential. Use any number from 1 to 10, corresponding to the degree to which the feature is important to you.

**Total = % rating feature as 8, 9 or 10.

***Excludes missing values.

Table 7 - Most Important Features in a Job (Prospect Groups)*

	Total**	Hot Prospects	Lukewarm Prospects	Longshots	Would Consider Relocation	Would Not Consider Relocation
Challenging Work	58%	46%	63%	59%	59%	56%
Competitive Salary	42	46	49	34	41	44
Opportunities for Advancement	33	43	37	23	40	18
Company Integrity	29	25	22	38	29	29
High-caliber Co-workers	27	18	28	32	29	24
City or Metropolitan Area in Which Job is Located	24	25	18	30	19	36
Recognition by Superiors	15	14	20	11	16	13
Medical Benefits	13	21	10	11	14	9
Job Stability	13	21	2	18	12	13
Good Office Atmosphere	11	21	8	9	10	13
Product Integrity	8	4	10	9	9	7
State-of-the-art Technology	7	0	9	7	7	7
Flexible Work Schedule	6	7	8	4	2	13
Comfortable Commute	4	0	2	7	2	7
Company Reputation in the Field	4	4	6	2	4	2
Office Privacy	2	0	4	0	0	4
Profit-sharing	2	0	2	2	2	0
Fringe Benefits Other Than Income or Health	2	0	0	4	2	0
Pension Plan	2	4	2	0	2	0
Stock Options	1	0	0	2	0	2
Dental Care Benefits	1	0	2	0	0	2
Bonuses	0	0	0	0	0	0
Assistance with Continuing Education	0	0	0	0	0	0
***Base	(135)	(28)	(51)	(56)	(90)	(45)

* Question: Please...select the three items that are most important to you and put a "1" next to the most important feature, a "2" next to the second most important feature, and a "3" next to the third most important feature. Only rank three features.

** Total mentioning as "most important."

***Excludes missing values.

Table 8 - Reasons For Rejecting Potential Employment (Prospect Groups)*

	Total**	Hot Prospects	Lukewarm Prospects	Longshots	Would Consider Relocation	Would Not Consider Relocation
Company Provides an Inferior Product or Service	78%	79%	76%	79%	82%	70%
Layoffs Too Likely	70	62	65	77	70	70
Management Not People-oriented	58	66	61	51	61	52
Company Undercapitalized/Poor R&D Funding	54	35	67	53	54	54
Routine Work Projects	51	41	63	47	57	41
City or Metropolitan Area in Which Job is Located	39	28	41	42	26	63
Somewhat Lower Than Competitive Salary Level	38	38	43	33	40	33
Insufficient Benefits	36	45	41	28	36	37
Uncomfortable Commute	37	41	27	44	29	52
Relocation Necessary	34	17	33	44	0	100
Interviewer Made Poor Impression	32	31	31	33	26	44
Not Using State-of-the-art Techniques/Technology	26	21	29	26	24	30
Company Too Small	11	17	12	7	11	11
Company Too Large	5	3	6	5	5	7
***Base	(135)	(29)	(49)	(57)	(89)	(46)

* Question: People reject potential opportunities for a number of reasons. Please rate each of the factors listed in terms of how likely you would be to reject potential employment because of that factor. Use the 10-point scale below to rate each item--the higher the number, the more likely you would be to reject the job.

** Total = % responding 8, 9, or 10.

***Excludes missing values.

3. Demographic Differences

Very few differences in the importance of job features were observed across demographic segments (tables not shown).

Those features where some differences were observed are exclusively benefits rather than work satisfaction or company variables, and none of them is substantial. As might be expected, those who rated medical benefits very important were more likely to be between the ages of 35 and 45 (prime child-rearing ages) than any of the other age groups. Continuing education was more important for younger professionals (25-34) than others. Office privacy, stock options, and profit sharing importance were all slightly higher among those with graduate work/degrees.

4. Summary and Implications

The data analysis revealed few statistically significant differences between Hot, Lukewarm and Longshot prospects concerning the importance of specific job features in assessing a professional opportunity. However, trends in the data suggest that the individuals in each prospect group do have slightly different priorities which could be addressed in recruitment efforts.

Hot Prospects are eager to change jobs now. They tend to be the most concerned with opportunities for advancement, medical benefits and good office atmosphere and the least concerned with challenging work, high caliber co-workers and job stability. They also tended to rate current salary, company integrity, product integrity and job location as less important than others.

Compared to Lukewarms and Longshots, Hot Prospects appear more likely to reject a job where management is not people-oriented, but less likely to reject one on the basis of relocation/location issues or company stability (layoffs, undercapitalized).

While the Hot Prospects appear eager to change jobs, there may be a negative side to hiring some of those persons. One senses that among the Hot Prospects some are so eager to obtain a new job that their standards are somewhat lower than those of the other prospect groups. There can be several legitimate reasons for this eagerness (problems with management, rumors that layoffs in the division are imminent, etc.), but it may also be that among this group some are inherently less satisfied with job situations in general. Certainly their current satisfaction is much lower (though there is no difference for the Hot Prospects as a whole in the number of job changes they have made compared to Lukewarms and Longshots). For these perenially dissatisfied, retention could become a problem.

Lukewarm Prospects, by contrast, appear to have the highest job satisfaction and benefits standards. They seem to be the most concerned with challenging work and recognition by superiors, and tend to rate salary, high caliber co-workers, continuing education, stock options, fringe benefits and profit sharing higher than others as well.

They appear most likely to reject a job on the basis of somewhat lower than competitive salary, routine work projects and undercapitalization, and least likely to do so because of an uncomfortable commute.

Some of those among the Lukewarms may be the "movers and shakers" of the industry. They expect a great deal from both the position itself and the employer.

Longshots, finally, appear to be the group most concerned with stability, in maintaining the status quo. Perhaps as a result, many of the Longshots may be the most concerned with company integrity and job location. They rated product integrity, job stability, comfortable commutes and company reputation highly as well.

They appear the most likely to reject a relocation job and/or a job where layoffs are too likely (an unstable situation).

Compared to the other prospect groups, Longshots were the least concerned with opportunities for advancement, medical benefits and competitive salary.

It may be that the Longshot group is composed of two distinct types of computer professionals: one type would be those who are well advanced in their careers and comfortably settled in a job and city they like. They have good money and benefits and little interest in making a job change, it would have to be a "once in a lifetime" opportunity.

The other group type of Longshot could be those who are "company men/women", individuals who value their current location and comfort more than fast track possibilities.

D. RELOCATION

1. Willingness to Relocate

As was mentioned in the previous section, computer professionals, as a group, are not averse to relocating for the right opportunity. Respondents were asked how likely they would be to reject a job opportunity requiring relocation on a one-to-ten scale, where "10" meant they would always reject the job and "1" meant they would never reject it (all other things being equal). Fully two-thirds (66%) would consider a job involving relocation (27% would never reject a job for that reason).

In fact, relocation ranked tenth out of the fourteen reasons for job rejection rated by the respondents, and significantly fewer individuals would always reject a relocation job than would reject a job where the company provides an inferior product/service (77%); layoffs are too likely (70%); management is not people-oriented (58%); the company is undercapitalized (54%); or where the job has too many routine work projects (51%).

2. Factors in Accepting a Relocation Job

In order to determine what factors would make a job involving relocation more (or less) attractive to computer professionals, we asked them to rate 25 factors in terms of their importance in accepting such a job. A ten point scale was used, where "10" meant the factor was 'essential' to acceptance and "1" meant it was 'not at all' an important consideration. We compared the responses of Hot, Lukewarm and Longshot prospects and those of people willing and not willing to relocate (See Tables 9 and 10).

Looking at the results as a whole, the most important factors in deciding to take a relocation job were: relocation assistance (essential to 71%), their spouse's attitude toward the move (essential to 66%), a substantial salary increase (62%), same or better quality of housing (62%) and good schools for children (essential to 53%).

By contrast, far fewer computer professionals indicated that the following factors would be extremely important in that decision: same/lower cost of living (24%), same/lower mortgage rates (23%), same/lower cost of housing (22%), help in finding a new house/apartment (21%), age of children (21%), proximity of stores/shopping (18%), availability of courses at educational institutions (17%), help in financing the purchase of a new house (17%) or help in finding suitable spouse employment (16%).

In order to see how these factors grouped together, the correlation matrix was examined. Six basic groupings emerged:

- Minimization of financial risk/loss
- Family considerations
- Career enhancement
- Quality of life considerations
- Location variables
- Spouse employment

Each of these "factor groups" will be discussed separately.

Table 9 - Features Important to Accepting A Job Offer Involving Relocation*

	Essential/Very Important to to Accepting a Job Requiring Relocation (8, 9, 10)	Moderate Importance (4 - 7)	Not Important to Accepting a Job Requiring Relocation (1, 2, 3)	Not Applicable
Relocation assistance, such as paying moving expenses	71%	24%	5%	0%
Spouses's attitude toward relocation	66	12	8	14
Substantial salary increase	62	34	4	0
Same or better quality of housing	62	36	2	0
Good school for children	53	12	14	21
Good, safe neighborhood to work in	49	44	7	0
Immediate advancement in position/rank/title	43	47	10	0
Clean air	40	53	7	0
Difficulty of selling the present house or apartment	36	48	16	0
Climate	34	59	7	0
Proximity of city/cultural life	34	56	10	0
Availability of recreational facilities	34	56	10	0
Children's attitude toward relocation	34	23	20	23
Ease of getting away to mountains, lakes, etc.	32	57	11	0
Many potential employers/availability of alternate employment in the area	29	51	20	0
Job availability for your spouse	29	28	29	14
Same or lower cost of living in new location	24	63	13	0
Same or lower mortgage rates in new location	23	59	18	0
Comparable or lower cost of new house or apartment	22	63	15	0
Help in finding a new house or apartment	21	54	25	0
Age of your children	21	31	25	23
Proximity of stores/shopping centers	18	61	21	0
Availability of courses at educational institutions	17	60	23	0
Help in financing the purchase of a new house	17	56	27	0
Help in finding suitable employment for spouse	16	32	38	14

(Base = 137)

*Question: Suppose you were considering a job involving relocation. Please rate all the features listed on how important they would be in deciding to accept a job offer involving relocation. Use a 10-point scale when rating each item, where "1" means of no importance whatsoever to accepting such a job. Use any number from 1 to 10 that corresponds to the importance of the item.

Table 10 -- Features Important to Accepting A Job Offer Involving Relocation (Prospect Groups)*

	Total**	Hot/Lukewarm Prospects Who Would Consider Relocation	Hot/Lukewarm Prospects Who Would Not Consider Relocation	Longshots Who Would Consider Relocation	Longshots Who Would Not Consider Relocation
Relocation assistance, such as paying moving expenses	70%	72%	67%	62%	79%
Spouses's attitude toward relocation	67	57	71	72	79
Substantial salary increase	62	55	86	53	67
Same or better quality of housing	62	50	81	62	75
Good school for children	53	47	48	53	75
Good, safe neighborhood to work in	49	43	43	47	71
Immediate advancement in position/rank/title	44	43	57	37	42
Clean air	41	40	33	37	54
Difficulty of selling the present house or apartment	36	26	33	37	37
Climate	35	28	52	25	50
Proximity of city/cultural life	34	28	43	44	29
Availability of recreational facilities	34	33	38	22	50
Children's attitude toward relocation	34	26	33	37	50
Ease of getting away to mountains, lakes, etc.	32	29	33	22	50
Many potential employers/ availability of alternate employment in the area	29	21	52	31	25

Table 10 (Continued) - Features Important to Accepting A Job Offer Involving Relocation (Prospect Groups)*

	Total**	Hot/Lukewarm Prospects Who Would Consider Relocation	Hot/Lukewarm Prospects Who Would Not Consider Relocation	Longshots Who Would Consider Relocation	Longshots Who Would Not Consider Relocation
Job availability for your spouse	29%	24%	48%	25%	29%
Same or lower cost of living in new location	24	19	29	9	50
Same or lower mortgage rates in new location	23	19	24	12	46
Comparable or lower cost of new house or apartment	22	21	24	9	42
Help in finding a new house or apartment	21	19	33	9	29
Age of your children	21	17	19	19	33
Proximity of stores/ shopping centers	18	17	18	9	29
Availability of courses at educational institutions	17	19	29	6	17
Help in financing the purchase of a new house	17	16	19	19	17
Help in finding suitable employment for spouse	16	5	33	22	17
Base	N = (135)	(58)	(21)	(32)	(24)

* Question: Suppose you were considering a job involving relocation. Please rate all the features listed on how important they would be in deciding to accept a job offer involving relocation. Use a 10-point scale when rating each item, where "1" means of no importance whatsoever to accepting such a job. Use any number from 1 to 10 that corresponds to the importance of the item.

**Percentage saying essential (8, 9 or 10).

a. Minimization of Financial Risk/Loss

This "factor group" includes relocation assistance (such as paying moving expenses), same/better quality of housing, problems selling the current house, having many potential employers in the area, same/lower cost of living, same/lower mortgage rates, comparable/lower cost of housing, home find assistance and home financing assistance. The basic concern suggested by the individual components is that of loss of purchasing power/financial security resulting from expenses that will be incurred in relocating to a new city or town. By and large, these issues are not encountered in a same-location job change (where one can generally assume living costs are relatively "fixed"). In that case, if a problem should occur, networks/resources are already in place to ease the process.

Of these financial risk/loss variables, relocation assistance and same/better quality of housing (essential to 71% and 62% respectively) were most frequently cited as important to the decision to take a job involving relocation. This is not really surprising because both reflect issues that help the individual directly compare his/her current situation to the prospective job. ("Will I have to spend my money just to get there—putting me in a bigger risk if it doesn't work? Once I'm there, will I find I can live better...or will I be worse off?").

Fewer cited difficulty of selling their current home (essential to 36%) or availability of alternative employment in the area (essential to 29%) as highly important factors. This is not surprising either, though, since the concerns expressed here are largely "second stage" concerns, or things to be worried about after the computer professional decides he/she is interested in the job and is starting the comparative analysis in earnest. Qualitatively, these variables express the risk of being "stuck" with the house in one's old location (and therefore unable to purchase appropriate housing in the new location), especially if the housing market is slow and the employer does not offer third party home selling assistance. They also reflect the fear of becoming threatened financially in the new location if the job does not work out for some reason (layoffs, disagreements, etc.).

Finally, the "third tier" variables reflect rather practical issues that will affect the speed and ease with which the computer pro could settle into his/her new location and become effective on the job (same/lower cost of living, same/lower mortgage rates, same lower cost of housing, home find assistance, home financing assistance). These are not generally "top of mind" factors early in the decision process, so it is not surprising that only one quarter or fewer of the respondents named them as essential determinants. It may be that those who mentioned them have been through the relocation process before (or have talked to someone else who's done it), so that their awareness is higher. Conversely, many relocating individuals choose not to purchase a home immediately (they want to get to know the area first), so their need for these services may be lower.

Regardless of the job candidate's current level of awareness of relocation problems, an employer can rest assured that these issues will emerge, and the company should take steps from the very beginning of the application process to address them. By providing economic information about the community, particularly with respect to housing/cost of living expenses (including property taxes and so on), and by taking taking time to acquaint the individual with the community (by showing neighborhoods, points of interest, etc.) and its major employers, the recruiting company can significantly lower the perceived risks of moving. Real estate firms offering relocation network services can be of great assistance to the company in this area, especially if the employer is not of sufficient size/means to provide these benefits directly.

b. Family Considerations and Relocation

Family considerations include the spouse's attitude toward relocation, the availability of good schools for children, children's attitudes toward relocation and the age of the children. Obviously, these concerns affect married more than single candidates, but since the number of single-parent families has increased, employers would do well to ascertain the candidate's situation early on.

Of all family considerations cited, spouse attitude toward relocation, considered essential/very imporant by two thirds (66%), is clearly the most important.

In order to distinguish between the theoretical importance of spouse attitude ("If I was married at the time") and the concerns of those who are currently married, we asked (in a separate question): "How much influence would your spouse have in your decision to accept a job involving relocation? Would you say the feelings of your spouse would be one of the most important factors, would have some influence, or would have almost no influence at all?" Responses to that question clearly underscored the importance of the spouse, as 83% of all married respondents said it would be one of the most important factors. Only 13% said the spouse's attitude would be of "some influence", and very few (4%) indicated the spouse's attitude would be irrelevent.

The implications of these findings are clear. When considering a candidate who will have to relocate, it is essential that the employer woo both spouses, and the earlier in the interviewing process the better. If possible, the spouse should be invited to visit during the first or second interview trip (depending on the number of trips usually involved in the hiring procedures) and his/her concerns should be actively addressed. A spouse who feels left out, (especially when he/she is being asked to give up family/friends, a comfortable "known" environment, and perhaps a valued job) can and will work against a relocation decision.

Other than the spouse's attitude, the most important family consideration is good schools for children, considered essential/very important by half (53%) of the computer professionals. (Note that 50% of the respondents have one or more children under 18 living at home.) As firms who specialize in relocation will affirm, school information is the number one request made by families considering a move. Even if the public schools in one's community are excellent, it is a good idea to have full information on all available schools ready and waiting.

Finally, some (34%) indicated that children's attitudes toward relocation and the age of the children (21%) could be crucial in a decision to move. It may be that this concern is primarily one of families with older children (high school age), since a move during that time period is thought to have a negative impact on social development. Thus, it will be important to ascertain the ages of the children involved and, to the extent possible, address their concerns about the move.

c. Career Development and Relocation

Career development considerations include a substantial salary increase (essential/very important to more than six in ten computer professionals) and immediate advancement in position/rank/title (essential/very important to 43%). Of the two, clearly, salary is more important (a concrete reward for moving). However, it is important to note that career considerations do not have as high a priority in a relocation context as they do when considering "any" job change. The financial risks and family considerations not encountered in the latter, perhaps more common situation, are just as important as career enhancement when relocation is involved. In a relocation recruitment situation, clearly it will be important that all three types of issues (risk reduction, family satisfaction, and career enhancement) be addressed for an acceptance of the job.

d. Good/Improved Quality of Life

Quality of life concerns include a good, safe neighborhood to work in, clean air, availability of recreation facilities, ease of getting away to mountains, lakes (etc.), and availability of courses at educational institutions. Of these, a good neighborhood to work in appears to be the most important (considered essential/very important by 49%). This makes good sense, as no one wants to work in a bad location, and if the individual has to relocate in the process, the situation would seem to be less than attractive. Similarly, interest in locations with clean air (noted as essential/very important by 40%) suggests that suburban or more rural locations will be preferred to those in the hearts of major metropolitan areas.

The "amenities" of the town/city where a job is located appear to be less important to a relocation decision. Still, one-third rated availability of recreational facilities (34%) and ease of getting away to "nature" (32%) as critical to their decision. Again, interest in these items suggests the desirability of non-urban settings.

Fewer indicated that courses at area colleges/schools (17%) would be a top priority in a relocation decision.

Compared to financial risk, family and career considerations, the quality of life variables are less important to most computer professionals. Thus, recruitment advertising or efforts which emphasize the positive aspects of life in the company's town rather than answering the candidate's more pressing concerns are likely to be ineffective.

e. Location Variables

Location variables include climate and proximity of city/cultural life (both vital considerations to 34% of the respondents). These variables did not correlate with any of the other variables rated (including the quality of life variables discussed above), which was surprising. Perhaps the explanation for this is that they are "givens" of the company's location and not controllable. Considering the high number who said the city or metropolitan area where a job is located would be an important factor in choosing a job, it may be that "climate" is simply considered a rather fickle reason for rejecting a job.

f. Spouse Employment

Of all the factors considered in the study, those dealing with spouse employment issues seemed the least pressing. While nearly a third (29%) said availability of employment for the spouse was important, few expressed concern with obtaining help finding suitable employment for the spouse (16%). One reason for these findings is certainly the high percentage of male respondents (85% of the sample) in conjunction with the fact that the majority of those who are married reported a spouse who either works part-time (20%) or not at all outside the home (38%). Of course, most probably feel that their spouse is capable of locating employment without assistance.

3. Conclusions About Relocation Job Criteria

To sum up this section, there were a number of concerns expressed by computer professionals with respect to jobs involving relocation. In contrast to consideration of "any" job change, financial risk and family considerations are often more important (i.e., "threshold concerns") than is immediate career enhancement to the job decision. Issues concerning the relative quality of life offered by the new location (excluding housing/cost of living variables), the location itself and spouse employment are less important overall, but are likely to emerge in a fair percentage of recruitment cases.

Alert recruiters will be prepared to "sell" the spouse as well as the job candidate on the area, and will address the concerns of the entire family about the move.

4. How Prospects Differ in Relocation Criteria

Overall, Hot Prospects do not differ markedly from others in terms of the criteria they consider important in a relocation decision. Only two of the variables showed significant differences: good schools for children and a safe neighborhood to work in. In both cases, similar to what we saw when we asked about features desired for "any job", Hot Prospects were less likely to rate these variables "essential" than were other prospects. In the case of good schools, only 38% of the Hot Prospects said they were "essential", compared to 52% of the Lukewarms and 63% of the Longshots. Similarly, only 31% of the Hot Prospects said a safe neighborhood was "essential", compared to half (50%) of the Lukewarms and 57% of the Longshots. (Table not shown)

However, when the prospect groups were subdivided by whether or not the respondents would consider relocating, several trends in the data did emerge (Table 10). For example, Hot and Lukewarm prospects who would consider relocation were the least likely to say that the spouse's attitude would be crucial in a relocation decision.

Hot and Lukewarm prospects who would not consider relocation, conversely, tended to rate the following items as more important to a relocation decision than others: salary increase, same/better quality of housing, availability of alternate employment and job availability for the spouse. These concerns suggest that the financial risks inherent in relocation are a major concern for the group as a whole.

Longshots who would not consider relocation showed similar concerns about a new location. They were more likely than others to say that environment (good neighborhood to work in, good schools for children) and housing issues (cost of living, mortgage rates, cost of housing) were crucial to a relocation decision.

5. Most Desirable/Least Desirable Destinations

If they are to move, California is unquestionably the most desirable destination, preferred by half (52%) of all computer professionals surveyed. Sun, sand and Silicon Valley probably account for this. Also preferred were: Colorado (by 29%), Oregon (26%), Massachusetts (23%) and Washington (21%), all known for their strong computer industries as well as their beauty and pleasant living. Others rated highly (by more than 11% of all respondents) were: Arizona, Hawaii, Virginia, Texas, New Hampshire, Florida, North Carolina, and Pennsylvania. See Table 11 for a complete listing.

More trouble would be found in attracting good recruits to such states as Alabama (34% would not go there), Alaska, Mississippi, North Dakota, New York, Louisiana, New Jersey, or South Dakota, to name a few. But the negative votes were cast more widely than the positive ones, suggesting that each computer professional only picked a few states and that less consensus exists on this score.

Table 11

Most and Least Preferred States for Relocation

State Most Preferred*	Total Respondents	State Least Preferred**	Total Respondents
California	52%	Alabama	34%
Colorado	29	Alaska	32
Oregon	26	Mississippi	29
Massachusetts	23	North Dakota	29
Washington	21	New York	26
Arizona	15	Louisiana	25
Hawaii	15	New Jersey	23
Virginia	15	South Dakota	23
Texas	15	Arkansas	22
New Hampshire	14	Florida	22
Florida	13	Kansas	21
North Carolina	13	Georgia	20
Pennsylvania	13	Iowa	20
New York	11	Nebraska	20
Maine	10	Idaho	18
Vermont	10	Tennessee	18
District of Columbia	10	Texas	18
Maryland	10	Oklahoma	17
Connecticut	8	Michigan	16
Minnesota	7	Montana	16
New Mexico	7	Illinois	15
Georgia	6	Kentucky	15
Idaho	6	Maine	15
Virgin Islands	5	Massachusetts	15
Alaska	4	Minnesota	15
Michigan	4	Missouri	15
New Jersey	4	South Carolina	15
Ohio	4	West Virginia	15
Rhode Island	4	Wyoming	15
South Carolina	4	Utah	14
Utah	4	District of Columbia	13
Wisconsin	4	North Carolina	13

Table 11 (Continued)

Most and Least Preferred States for Relocation

State Most Preferred*	Total Respondents	State Least Preferred**	Total Respondents
Kentucky	3%	Ohio	13%
Nevada	3	California	12
Illinois	2	Indiana	12
Missouri	2	Nevada	12
Montana	2	Rhode Island	12
West Virginia	2	Arizona	10
Indiana	2	Connecticut	10
Kansas	2	Hawaii	10
Wyoming	2	New Hampshire	10
Delaware	1	Virgin Islands	10
Nebraska	1	Wisconsin	10
Oklahoma	1	Vermont	9
Tennessee	1	Delaware	8
Alabama	0	New Mexico	8
Arkansas	0	Pennsylvania	8
Iowa	0	Maryland	7
Louisiana	0	Oregon	7
Mississippi	0	Washington	7
North Dakota	0	Virginia	6
South Dakota	0	Colorado	5

Base = 137

Question: * a) If you were to relocate, please specify which states you would most prefer to go to.

**b) If you were to relocate, please specify which states you would not go to.

E. LOOKING FOR A JOB

1. Sources of Information

We asked computer professionals two questions about where they get information about new jobs. In the first question, respondents rated thirteen sources of information as "very useful", "useful", "not very useful" or "not at all useful". (They could also indicate that they were not familiar with the source.) In the second question, computer professionals indicated which one information source they use or would use most often for job information.

As Table 12 shows, only five sources of job information were rated as "very useful" or "useful" by the majority of the respondents: word of mouth/personal contacts, newspaper employment advertising, ads in trade journals, employment/executive search firms, and employee referral programs. Of these, word of mouth/personal contacts is clearly the most important source (96% rated it as "very useful" or "useful"). Newspaper advertising (83%) was second, and the most highly rated of all media-based information sources.

Following those sources, two-thirds considered ads in trade journals (75%) and employment/executive search firms (74%) useful information sources, and 65% rated employee referral programs that way.

Fewer said open houses (38%), job fairs (34%), employment advertising through the mail (28%) or professional directories (23%) were "very useful" or "useful" information sources. The lowest perceived usefulness ratings went to computerized employment data banks (15%), radio commercials (10%), state employment services (8%), and TV commercials (7%).

Table 12

Usefulness of Employment Information Sources*

	Very Useful/ Useful	Not Very/ Not At All Useful	Not Familiar With Source
Word of Mouth/Personal Contacts	96%	4%	0%
Newspaper Employment Ads	83	17	0
Ads in Trade Publications or Journals	75	25	0
Employment/Executive Search/ Placement Agencies	74	23	3
Employee Referral Program	65	23	12
Open Houses	38	46	16
Job Fairs	34	48	18
Employment Advertising Through the Mail	28	58	14
Professional Directories	23	51	26
Computerized Employment Data Banks	15	52	33
Radio Commercials	10	84	6
State Employment Services	8	76	16
TV Commercials	7	82	11

Base = 137

---

*Question: Think of your own experience with the sources of employment information and of anything you might have heard from others. Please rate each item listed in terms of how useful it is or would be as a source of employment information.

At first glance it may seem surprising that so few sources of information were considered useful. However, when we consider the experience levels of the computer professionals who responded to the survey, these findings are less surprising. By and large, our respondents were experienced professionals who already have developed personal networks and probably have had some experience with recruiters. It is likely that those with less experience would be more apt to utilize less "personal" sources (such as job fairs, state employment services, etc.), more frequently than their established counterparts.

2. Most Important Source of Information

The greater overall importance of the "big five" information sources (word of mouth, journal ads, newspaper ads, employment agencies and referral programs) was reinforced when computer professionals were asked to select the one source which they use/would use most frequently. Word of mouth (most important to a third--34%) was still the most frequently mentioned of the sources, but was closely followed by newspaper employment ads (24%), ads in trade journals (20%) and employment/executive search firms (19%). In this case only one respondent noted employee referral programs as most important (1%), but none of the other sources of information was mentioned as being most important.
(See Table 13.)

Table 13

Single Source of Job Information Used Most Often

	Percent of Respondents
Word of Mouth/Personal Contacts/Personal Networks	34%
Newspaper Employment Ads	24
Ads in Journals	20
Employment Agencies/Registries	19
Employee Referral Programs	1
Other	2

Base = 137

Not Mentioned:

Radio Commercials
Professional Directories
TV Commercials
Computerized Employment Data Banks
State Employment Services
Job Fairs
Open Houses
Direct Mail

*Question: What one source of employment information do you/would you use most often when looking for a job, when thinking of changing jobs, or when just monitoring job opportunities?

Interestingly, Hot Prospects were the least likely of the three groups to report word of mouth as the most frequently used source of job information: only 24% of the Hot Prospects said that, compared to 31% of the Lukewarms and 44% of the Longshots. In addition, Hot Prospects were significantly more likely to report using newspaper classifieds than were Lukewarms (41% compared to 16%). (Table not shown) Recall here that 24% overall rated newspaper classifieds as their most important source. One explanation for this may be that personal networks provide ongoing "surveillance" while newspaper ads are associated with an active job search.

3. How Computer Professionals Use the Newspaper

Like most other people, a majority of computer professionals surveyed reported reading or looking at a daily newspaper every day. (See Table 14.) Over half said they read or look at a paper Mondays through Fridays, with reading levels slightly higher on Saturdays (57%) and almost universal (92%) on Sundays. It is interesting to note that, compared to the population as a whole, these computer professionals are somewhat less likely to read the newspaper Monday through Saturday (54% compared to 63% of all adults) but substantially more likely than the population to read on Sunday (92% compared to 64% of all adults).

This national comparison, based on Simmons 1986 Survey of Markets and Media data, is not direct, since the Simmons question asked about "read yesterday" while the current study asked respondents to report reading for

Table 14

Days of Week Newspaper Usually Read*

	Percent of Respondents
Monday	53%
Tuesday	53
Wednesday	52
Thursday	53
Friday	54
Saturday	57
Sunday	92
Don't Know/No Answer	2

Base = 137

*Question: On what days of the week do you usually read or look at a daily or weekend newspaper?

each day of the week separately. Still, the findings suggest that computer professionals, perhaps because of their work habits and/or personality types, differ somewhat from the general population in their newspaper reading habits.

No differences in reading frequency/days were observed based on prospect status. That is, Hot Prospects were as likely as others to be reading a paper "every day".

As would be expected, Hot Prospects do report consulting the classified section of the newspaper for job information more frequently than Lukewarms or Longshots (though one person--a Lukewarm--said he looked at the classifieds every day). As Table 15 shows, Hot Prospects are twice as likely as others to say they consult the classifieds at least once a week (45% compared to 20% of the Lukewarms and 23% of the Longshots).

With respect to the specific days of the week the classifieds are consulted, Hot Prospects are no different from other computer professionals. Sunday, of course, is far and away the most popular day for reading the classifieds (89% said they usually do so then). Less than one in ten consulted the daily newspaper's classified, presumably because of the rich offerings available in the Sunday paper. (Table not shown)

When they do check the classifieds for employment information, computer professionals look under a variety of headings. None was named by a majority of respondents, however, perhaps because of their different

Table 15

Frequency of Newspaper Employment Ad Reading In Help Wanted Section*

	Total of Respondents	Hot Prospects	Lukewarms	Longshots
Every Day	1%	0%	2%	0%
Several Times a Week	7	17	4	4
Once a Week	19	28	16	20
Once Every Couple of Weeks	18	10	22	18
Once a Month	15	17	16	13
Once Every Couple of Months or Less Frequently	40	28	40	45
Base**	(135)	(29)	(51)	(56)

* Question: How often to you read or look at the employment ads in the help wanted section of the newspaper?

**Excludes missing answers.

specialties. Computer professionals most frequently look for jobs under the heading "Data processing/computer programming" (43%). Other headings consulted include: "Engineers" (24%), "Computers" (20%), "Professional" (17%), "Analyst/system analyst" (15%) and "Administrative/management" (10%). A few others were named, but none by more than 2%. Table 16 shows these data.

While the classified section is where computer professionals most frequently look for job information -- more than eight in ten said they usually (73%), or sometimes (12%), consult it -- other sections of the paper are scanned as well. (On average, each person reported consulting two different sections for information.) As Table 17 demonstrates, three-fourths usually or sometimes consult the business section (75%) and nearly half look in careers (48%) for job information. Further, one-fifth consult the science section (21%).

Finally, in addition to the advertising sections that computer professionals actively consult for job information, recruiters ought to be aware of their general readership interests. Editorial material might also spark their interest in a job, and ads could be effectively placed in these sections. Nearly nine in ten (89%) of the computer professionals report that they usually read or look at the general news section, for example. The majority said they usually read business (79%), and local news (68%). About half of the computer professionals surveyed usually read entertainment (51%), the editorials (50%), sports (46%) and the weekend section (45%). Table 18 gives a complete breakdown of readership rates.

Table 16

Newspaper Employment Listings Consulted in a Job Search*

	Total Respondents**
Data Processing/Computer Programming	43%
Engineers	24
Computers	20
Professional	17
Analyst/Systems Analyst	15
Administrative/Management	10
Don't Know	3
Career Opportunities	2
Sales	1
Nursing	1
Other	7
No Response	10

Base = 137

* Question: Under what headings within the employment section of a newspaper do you look for ads in your professional field? (Just list the headings that come to mind; don't go to the paper and look them up.)

**Total exceeds 100% due to multiple responses.

Table 17

Sections of the Newspaper Consulted for Employment Advertising

	Sections Consulted:*		
	Usually	Occasionally	Subtotal**
Classified	73%	12%	85%
Business	59	16	75
Careers	37	11	48
Science	10	11	21
Sports	1	7	8
Local News	1	5	6
General News	0	4	4
Entertainment	0	2	2
Home	0	1	1
Other	1	1	2
Don't Know/ No Answer	5	6	11
"No Others"	N/A	47	N/A
Base = 137 Respondents			
Average Number of Sections Consulted (Excluding "Other")	1.8	.7	2.5

* Question: Employment advertising is usually in the classified section or in the business section. However, sometimes employment ads are in other parts of the paper. Please circle the sections or types of pages you _usually_ look at if and when you are looking for employment ads. Now, circle any other sections or types of pages you might _occasionally_ look at for employment ads.

**Sum of both responses.

Table 18

Sections of Newspaper Usually Read*

	Percent of Respondents
General News	89%
Business	79
Local News	68
Entertainment	51
Editorial Page	50
Sports	46
Weekend Magazine	45
Classified	36
Travel	33
Careers	32
Life-style	27
Home	20
Food	13
Comics	11
Science	7
Fashion	6
Other	2

Base = 137

*Question: What sections of the newspaper do you usually read or look at?

4. What Makes Them Notice Particular Employment Ads?

a. Essential/Screening Information

Computer professionals want solid nuts and bolts information in an employment classified ad. We asked them to rate thirteen features in terms of how important these features would be in attracting their attention to a specific ad (as "very", "somewhat", "not very" or "not at all" important). Table 19 shows these data.

Two-thirds (67%) said that the job description was very important, followed by job title, required qualifications/experience and job location (rated very important by 55%, 54% and 52% respectively). Note that most of the remaining respondents rated these features as somewhat/not very important. We might expect that these "first tier" types of information allow computer professionals to narrow their search and focus on a few good opportunities.

Following these more essential features, many of the computer professionals indicated that equipment/hardware/software technology specs, (39%), salary (36%), the size of the ad (34%) and the company name or logo (34%) were very important in attracting their attention to an ad. These job features may be "second tier" considerations for several reasons. First, the computer professional needs to screen through a mass of ads to find those few for which he is most qualified and that seem to offer the

Table 19

Features Attracting Attention to Ad*

	Very Important (1)	Somewhat/ Not Very Important (2 & 3)	Not At All Important (4)
Job Description	67%	32%	1%
Job Title	55	44	1
Required Qualifications and Experience	54	44	2
Job Location	52	44	4
Equipment/Hardware/ Software Technology	39	54	7
Salary	36	60	4
Size of the Ad	34	61	5
Company Name and/or Logo	34	63	3
Headline of Ad	23	72	5
Statement of Company Philosophy ("where the company is going," technological vision of the future)	13	76	11
Ad's Position on the Page	7	65	28
Graphics/Photos/Drawings	4	80	16
Descriptives Such as "Stimulating," "dynamic," "future-oriented," "career opportunity"	3	69	28

Base = 137

*Question: How important are the features listed in attracting your attention to a newspaper employment ad? Please rate each one on whether it is very important, somewhat important, not very important, or not at all important.

greatest "job satisfaction" potential. Equipment and salary, by contrast, may be aspects of the job which have to be discussed in the interview. Ad size, similarly, while important in attracting attention, (particularly for two "comparable" jobs), will be insufficient grounds for attracting attention to a job listing if the title/description is inappropriate.

b. Ad Features

Fewer said that the headline of the ad would be very important in attracting attention to the ad (23%). And very few of the computer professionals indicated that a statement of the company's philosophy (13%), the ad's position on the page (7%), graphics/photos/ drawings (4%) or descriptive phrases, such as "stimulating environment" (3%) would attract their attention to an ad. Again, these findings suggest that flash without substance will not be attractive in an ad and/or that the job must appear appropriate before the ad will be seriously considered for a response.

Of course, advertising professionals know that many of these ad characteristics have more impact than most laymen admit. Clearly, a large, well constructed ad filled with solid job information will attract considerable attention.

c. Hot Prospects Want More Definite Information

Hot Prospects differed from other individuals in several ways. First, they were much more likely to say that the job title would be important in attracting them to the ad (72% compared to 47% of the Lukewarms and 54% of the Longshots). This may reflect the more focused search of the Hot Prospect compared to other computer professionals. (Table not shown.)

In that same vein, Hot Prospects tended to value job descriptions more and ad size less than others, though these differences were not statistically significant. Again, this could reflect the fact that they are actively selecting ads to respond to while Lukewarms and Longshots are looking through the ads on more of a survey basis...to keep current with employment opportunities.

Finally, job location was less important to Hot Prospects (48% compared to 68% of the Longshots) and those would consider relocation (46% compared to 72% of those who would not consider relocation). These findings reinforce the idea that for those who are interested in getting out of their current situations quickly, location is less important than is future job stability.

5. Will They Respond to Your Ad?

In order to determine how instructions for contacting the recruiter given in an employment ad may impact on the responses generated by the ad, we asked computer professionals to indicate how likely they would be to follow nine types of instructions. For each type of instruction respondents indicated whether they would be "very likely", "somewhat likely", "not too likely" or "not at all likely" to respond to the ad. We also asked them a series of questions regarding responses to "blind" ads; those ads in which the recruiting firm does not identify itself.

As Table 20 shows, no more than half of the computer professionals said they would be "very likely" to respond to any specific instructions. The relatively low interest overall probably reflects the fact that the type of instruction would not be the most important factor in response. That is, job description, title, location, salary and so on would be the features of an ad based on which the individual selected a subsample of all listed ads for possible response. Only then would the instructions given become a factor in their responses.

a. Best Bet: Direct Contact with Hiring Department

Looking at the data in Table 20, it is clear that computer professionals would be most likely to answer an ad which asked them to send in a resume (54% "very likely" to respond"), contact the department head (51%), contact the person in charge of hiring (49%) or call in (46%). These types of instructions, provided that a specific company and job are named, suggest that the ad was written to fill a specific position for which a search is now in progress. For that reason, a computer professional will most likely feel he/she would not be wasting time in answering the ad. Further, most of these instructions ask that the individual contact a real person involved in hiring, someone who, it must be assumed, the respondent would actually interview with or work for.

b. Less Effective: Personnel Department Contacts

In contrast, computer professionals are less likely to respond to ads asking that they contact a specific person in the personnel department (only about 30% would be very likely to do so). As our earlier qualitative research indicated, computer pros dislike having to be "approved of" by personnel, since these departments are not usually able to tell them much about the job in advance and may impose "stricter" criteria in selecting candidates to inteview with the department. Further, computer professionals may feel that dealing with personnel is akin to wading through bureaucratic red tape. It's too much trouble to bother with.

Table 20

Response to Employment Ads*

	Very Likely (1)	Not Too Likely (2 - 3)	Not At All Likely (4)
Send in a resume	54%	44%	2%
Contact department head	51	48	1
Contact the person in charge of hiring	49	47	4
Make a telephone call	46	53	1
Contact a specific person in the personnel department	30	65	5
Attend an open house	16	72	12
Contact personnel department	16	77	7
Call a job hotline	14	67	19
Mail in an application coupon included in the ad	11	62	27

Base = 137

*Question: As you know, employment ads contain different instructions as to how to contact the employer. If you were looking for employment, with all-other things being equal, how likely would you be to respond to an ad asking you to do the following...?

c. Least Effective: Mass Recruitment/Impersonal Techniques

Computer professionals are even less likely to respond to ads for which they must attend an open house (16% very likely), contact personnel department--without a specific person to call/write--(16%), call a job hotline (14%), or mail in an application coupon included in the ad (11%). These instructions may suggest, first of all, that the advertiser is an employment agency or a company recruiting prospects without a "real" job ready and waiting. They are also much less personal, and survey respondents may be reacting to the notion that an ad with these types of instructions will not contain enough other information about the job to warrant the expenditure of time and effort.

d. Blind Ads: Avoid Whenever Possible

In a separate question we asked about blind ads. Lack of information, the feeling that time will be wasted, and perhaps the high perceived risk of inadvertently applying to one's own company may explain why virtually no one said he/she would be very likely to respond to a such an ad. (Table not shown.) Only two percent would be very likely to answer a blind ad, and a mere 8% more would be somewhat likely to do so. The vast majority (89%) would not be likely to answer this type of ad. (One person -- 1% -- did not respond to the question.)

Neither a guaranteed response nor the promise that a resume would not be sent to certain specified companies altered the likelihood of response to a blind ad. (These questions were asked only of those who said they would be "not too" or "not at all" likely to respond to a blind ad, all else being "equal".)

Clearly, the obvious dislike of blind ads poses problems for employers, since circumstances sometimes make it inadvisable for the firm to reveal itself. This will be more of a problem when the firm hopes to attract local talent, and will not be able to recruit "openly" in other locations. We might fear further that highly experienced "good recruits" would be the least likely of all groups to respond to such an ad, which would mean that the employer would be unlikely to attract qualified personnel using this method. In those cases, it may be that recruitment agencies should be used as intermediaries in newspaper advertising.

6. Summary

To summarize this section, a strong employment ad will provide detailed information about a real and specific job, the requirements of the position, the job location and the job's title. The ad should ask candidates to respond with a resume or phone call to an individual in the hiring department. It is unlikely that the size of the ad and other "creative" ad features will positively impact the attractiveness of the ad relative to competition unless this important information is present.

Ads should be placed under a variety of headings within the classified section, including the more general "Data processing/computer programming" category, "Engineers", "Computers" and "Professionals" types of headings, as well as more specific categories (e.g., "Science") if the job calls for that subspecialty.

Firms should consider placing their ads in the business and careers sections of the paper as well as in classified. Sunday placement is essential, and it would be advisable to run the ad(s) for several weeks in order to capture less frequent ad readers (e.g., Lukewarm prospects) who might turn out to be excellent candidates.

SUMMARY AND RECOMMENDATIONS

The successful recruitment and retention of experienced computer professionals poses a tremendous challenge to employers. As a group, they demonstrate a strong desire for challenging, satisfying jobs, and they appear to expect a great deal from the employer. Perhaps because of the positive experiences they have had so far in their careers, computer professionals have developed both healthy egos and high expectations of the industries in which they work.

As we have seen, a large percentage of the computer professionals surveyed report at least some interest in exploring new job opportunities, and a majority would consider relocating for the right position. Contrary to what we might expect, however, the individuals most likely to change jobs show little segmentation on the basis of demographic characteristics, years of experience in the field, or area of specialization. The only variable in the survey which clearly delineated between those more and less likely to change jobs was satisfaction with their current job.

Why are some less satisfied? Based on what computer professionals identified as key features when looking for a new job, we might expect individuals performing "routine" work tasks without much hope for advancement to be the least satisfied, particularly if their current salary is low. However, not everyone rated challenging work as the most important factor in a job decision. Other factors which figured prominently in computer professionals' evaluations of job features included job stability, poor product quality, poor management, and lack of support for the computer function. It seems likely that any combination of these "unfavorable" conditions would produce dissatisfaction.

In part, these sources of dissatisfaction are probably the result of the fact that these computer professionals were "in the right place at the right time". They entered the field in an expansive time, and their expertise has been coveted by employers all along. (By contrast, people entering advertising and other "high pressure" glamour industries have traditionally expected huge workloads for low pay.)

Nevertheless, with large shortages of experienced computer pros now looming on the horizon, firms would do well to enhance their competitive position in the industry. In order to attract and retain good workers, companies employing computer professionals need to assess their current levels of recruiting success and take steps to overcome shortfalls.

Clearly, an evaluation of the steps that need to be taken should begin internally. Although some might seem obvious, it is worth asking these questions and taking the answers seriously: Is the company satisfied with the "fit" between its computer functions and the types of individuals it employs? Is the firm really competitive in terms of salary and benefits? How successful are current recruitment programs, and what is the annual turnover rate? Are current employees satisfied? (This last point is critical and cannot be overlooked in the evaluation. Ask employees about this and listen to their responses.)

In addition, it will be helpful to view the recruitment function as part of an overall, ongoing public relations program for the company. Considering the importance of personal networks as sources of job information for computer pros (including university professors), word available via the grapevine of a firm's reputation as an employer strongly affects the response generated by its recruitment efforts.

With respect to recruitment advertising, the content of ads is critical. As discussed earlier, computer pros say they want hard, straight-forward information in an ad before they will consider responding to it. Minimum requirements include a solid job description, the job title, required qualifications/experience and the location of the job. Some indication of the salary range, career path/opportunities and equipment/ hardware/software technology is also strongly recommended. By contrast, "fluffy" content, such as descriptive words ("stimulating", "career opportunity") and statements of company philosophy ("where the company is going") are much less attractive to these serious individuals. (They may also feel they are qualified to judge, based on the "hard" information present, whether or not the job is going to be challenging.)

While fewer computer professionals indicated that ad style/features, such as headlines, ads size, ad position on the page and graphics/photos/drawings would be important in attracting their attention to the ad, these findings need to be taken with a grain of salt. (Many people don't like to admit they are influenced by ad style, anyway.) It may be that "flashy" ads are perceived as lacking in substance, or are being used in an attempt to cover up some negative aspects of the job, especially if hard information is lacking or buried in a flowery text. A large, well placed ad full of hard information, by contrast, would be very attention-getting.

With respect to the types of headlines that would be most effective, clearly a job title or some other indication of the experience level and specialty required would be recommended. These titles allow the individual to select the ad at a glance and also demonstrate that the company regards computer pros as professionals. Other "newsworthy" information could also be effective in that regard, if the firm is expanding a division, opening a new division, starting a major project, etc.

The tone of the ad should be serious, but should also convey management's respect and concern for the individual as well as the firm's commitment to excellence in product and employees. It is particularly important to stress commitment to employees in "relocation ads" and to address their financial concerns (e.g., "We provide complete relocation benefits"). In the case of relocation advertising, it is strongly recommended that the ad not focus on the joys of living in the lovely city where the firm is located. (That will probably be perceived as "covering up" or as unprofessional in addition to not addressing the issues of the job itself.)

Without question, ads should be placed in the Sunday edition of the newspaper, and should be run for several weeks to increase "reach" among those computer professionals who do not read the classified section every week. (Even among Hot Prospects, a majority does not read the classifieds every week.)

If the firm is concerned about the "psychological depreciation" of its ad (the longer the job is on the market, the less desirable it looks), several tactics could be used effectively to overcome this problem. First, for a one-shot trial of the ad, consider placing it in the business section, since that is read more regularly than the classifieds. Second, the firm could include reasons for a longer running ad right in the ad itself, or cite a closing date for acceptance of resumes.

In order to generate response from the largest number of qualified candidates, ads should include instructions that are quick and easy to follow (send a resume, call), and, if possible, that put the respondent in direct contact with the hiring department. Whenever possible, avoid using blind ads, which not only limit the number of responses generated but fail to attract the best prospects as well.

APPENDIX

SELECTED TABLES

Table 21

Satisfaction With Current Employer*

	Total Respondents
10 - Extremely Satisfied	9%
9	18
8	34
7	16
6	8
5	4
4	7
3	4
2	0
1 - Extremely Dissatisfied	0
	100%

Mean = 7.5

Base = 137

*Question: How satisfied are you with your current employer on an overall basis? Use the 10-point scale, where the higher the number, the more satisfied you are with your employer.

Table 22

Marital Status of Respondents*

	Total Respondents
Married	71%
Single	23
Widowed	0
Divorced	6
Separated	0
	100%

Base = 137

*Question: Marital Status

Table 23

Occupation of Spouse*

	Total Respondents
Working full-time	42%
Working part-time	20
Not working outside the home	38
	100%

Base = 98

*Question: If married, your spouse is:

Table 24

Number of Children in Household Under the Age of 18*

	Total Respondents
None	38%
One	17
Two	26
Three	6
Four or more	1
No answer	12
	100%

Base = 137

*Question: Number of children in your household under the age of 18:

Table 25

Sex of Respondents*

	Total Respondents
Male	85%
Female	15
	100%

Base = 137

*Question: Age:

Table 26

Age of Respondents

	Total Respondents
24 or under	2%
25 - 34	33
35 - 45	52
46 - 50	7
51 or older	5
No answer	1
	100%

Base = 137

Table 27

Number of Persons in Household*

	Total Respondents
One	21%
Two	27
Three	18
Four	24
Five	9
Six or more	1
	100%

Base = 137

*Question: Number of people in household including yourself.

Table 28

Annual Salary*

U.S. Dollars	Total Respondents
Under 20,000	0%
20,000 - 24,999	1
25,000 - 29,999	5
30,000 - 34,999	9
35,000 - 39,999	12
40,000 - 44,999	12
45,000 - 49,999	18
50,000 - 54,999	7
55,000 - 59,999	9
60,000 - 64,999	9
54,000 - 69,999	2
70,000 - 74,999	2
75,000 - 79,999	1
80,000 or more	6
No answer	7
	100%

Base = 137

*Question: Your annual salary:

Table 29

Total Gross 1984 Household Income*

U.S. Dollars	Total Respondents
Under 20,000	0%
20,000 - 24,999	1
25,000 - 29,999	3
30,000 - 34,999	7
35,000 - 39,999	7
40,000 - 44,999	10
45,000 - 49,999	14
50,000 - 54,999	9
55,000 - 59,999	4
60,000 - 64,999	8
65,000 - 69,999	5
70,000 - 74,999	2
75,000 - 79,999	2
80,000 or more	17
No answer	0
	100%

Base = 137

*Question: Total gross 1984 household income before taxes.

Table 30

Number of Years Employed in the Computer Science/Computer Engineering Field

	Respondents
Two - 10	49%
11 - 15	31
16+	20
Total	100%

Base = 137

Table 31

Area of Specialization

	Respondents
Management	20%
Software Applications Specialist	17
Computer Engineer	16
Computer Programmer	14
Systems Analyst	12
Systems Consultant	11
Research	3
Other	27
Total	100%

Base = 137

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RECRUITING ENGINEERS:

REACHING JOB PROSPECTS BY NEWSPAPER ADVERTISING

This document is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

March 1988

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CONTENTS

Section Page

LIST OF TABLES . . . iii

HIGHLIGHTS . . . v

- What Engineers Want in a Job . . . v
- Relocation . . . vi
- Looking for a Job . . . vii
- Conclusions and Recommendations . . . viii

INTRODUCTION . . . x

- How the Study Was Done . . . xi
- How to Read This Report . . . xii

I. DETAILED FINDINGS . . . 1

- A. Prospects for Changing Jobs and Relocating . . . 1
  - 1. Overview . . . 1
  - 2. Backgrounds of Prospects and Those Who Might Relocate . . . 3

- B. What Engineers Look for in a Job . . . 13
  - 1. Overview . . . 13
  - 2. Features Important to Prospects and Those Who Might Relocate . . . 14

- C. What Engineers Avoid in a Job . . . 22
  - 1. Overview . . . 22
  - 2. Factors to be Avoided by Prospects and Those Who Might Relocate . . . 22

- D. Engineers' Concerns about Relocation . . . 26
  - 1. Overview . . . 26
  - 2. Considerations Important to Prospects and Those Who Might Relocate . . . 28
  - 3. Relocation Destinations . . . 29

- E. How Engineers Look for a Job . . . 36
  - 1. Newspapers and Other Sources of Employment Information . . . 36
  - 2. Use of the Newspaper as a Source of Employment Information . . . 39
  - 3. Engineers' Response to Characteristics of Employment Ads . . . 47

II. CONCLUSIONS . . . 53

LIST OF TABLES

Table Page

1. Engineers' Personal Characteristics 6

2. Engineers' Personal Characteristics by Propensity to Relocate . . 8

3. Engineers' Professional Characteristics 9

4. Engineers' Professional Characteristics by Propensity to Relocate 11

5. Engineers' Ratings of Features Wanted in a Job 16

6. Job Features Ranked First, Second, or Third in Importance by Engineers 18

7. Engineers' Ratings of Features Wanted in a Job by Propensity to Relocate 20

8. Job Features Ranked First, Second, or Third in Importance by Engineers by Their Propensity to Relocate 21

9. Engineers' Ratings of Features to be Avoided in a Job 24

10. Engineers' Ratings of Features to be Avoided in a Job by Propensity to Relocate 25

11. Engineers' Ratings of Factors Important for Relocation Decisions 31

12. Engineers' Ratings of Factors Important for Relocation Decisions by Propensity to Relocate 33

13. Engineers' Ratings of States for Relocation 35

14. Percentage of Engineers Rating Each Source as "Very Useful" . . . 37

15. Job Information Source Used Most Often by Engineers 38

16. Days of the Week Engineers Usually Read or Look at the Newspaper 40

17. Sections of the Newspaper Engineers Usually Read or Look At . . . 41

18. Engineers' Frequency of Reading Employment Classified Ads in the Newspaper 43

19. Days of the Week Engineers Usually Read or Look at Employment Ads in the Newspaper 44

LIST OF TABLES (Continued)

Table Page

20. Sections of the Newspaper Engineers Usually Look at for Employment Ads 45

21. Sections of the Newspaper Engineers Usually or Occasionally Look at for Employment Ads 46

22. Importance of Ad Features in Attracting Engineers' Attention to Newspaper Employment Ads 50

23. Engineers' Likelihood of Responding to a Blind Ad Under Various Conditions 51

24. Engineers' Likelihood of Responding to Instructions in Employment Ads 52

HIGHLIGHTS

A national sample of engineers was surveyed to determine their prospects for changing jobs, the features they would seek and avoid in a job, their concerns about relocation and their willingness to relocate, and the process they go through in looking for a job. Just one in five engineers is a "Hot Prospect" for changing jobs in the next year; almost half are "Longshots." While nearly a third of the engineers rule out the possibility of relocation, three-quarters of the Hot Prospects are willing to consider relocating. Overall about four in ten are either Hot or Lukewarm Prospects (the latter may or may not change jobs) who are willing to consider relocating. Hot Prospects are the least satisfied of the three groups and have been with their current employers the shortest period of time; Longshots are the most satisfied and have the longest job tenure.

What Engineers Want in a Job

The most essential features that engineers seek in a job are (1) challenging work, (2) company integrity, (3) competitive salary, and (4) opportunities for advancement. Some engineers would place features like job stability, high caliber co-workers, the area where the job is located, product integrity, state-of-the-art technology, and medical benefits ahead of the four primary features, but they are a decided minority. Other fringe benefits and financial considerations that were frequently mentioned (e.g., pension plan, medical benefits, dental benefits, other fringe benefits, stock options, profit-sharing, and bonuses) were rarely viewed as paramount.

More than three out of four engineers would avoid a job with a company that provides an inferior product or service or where layoffs are too likely. Around half would also reject a job with a company that is undercapitalized or has poor R&D funding, where management is not people-oriented, and where they will be faced with "routine" work projects. Interestingly, while a competitive salary was named by about three-fourths as one of the three most important features to be sought in a job, only three in ten would reject a job outright because of a lower than competitive salary.

Relocation

Three out of ten engineers reject the idea of relocating, while the remainder are at least willing to entertain the possibility. Those who are willing to consider relocation are more concerned with finding challenging work, while those who rule out relocation are more concerned about salary, medical benefits, and the city or metropolitan area in which the job is located.

Paramount among engineers' concerns when they think about relocation are the attitude of the spouse and relocation assistance (e.g., moving expenses), both of which are considered critical by around three-fourths. At least half also find a substantial salary increase and immediate advancement in position, rank, or title to be a requirement. Interestingly, while the attitude of the spouse is critical to the decision to relocate, few engineers say that job availability or help in finding employment for the spouse are critical to the decision to relocate.

Hot Prospects express more concern with a number of concrete practical matters involved in relocating (e.g., difficulty in selling their house or apartment, help in financing a home in the new location, job availability for the spouse, the presence of alternate employers in the area) than do Longshots. These concerns may have more reality for them since they are now contemplating a job change. And those who reject the idea of relocation impose correspondingly more requirements on a decision to relocate than do those who are open to the idea.

Looking for a Job

While engineers consider word of mouth and personal contacts to be the best source of employment information, other useful sources include newspaper ads; executive search, placement, and employment agencies; and ads in trade publications or journals. Newspaper classified ads play an important role in providing engineers with information about employment opportunities — whether or not they are actually looking for a job.

Sunday is the day that engineers most often read the employment ads, and eight out of ten Hot Prospects manage to look at newspaper employment classifieds at least once every couple of weeks. (Half read the ads once a week or more.) But even those who are at best ambivalent about changing jobs — including about half of the Lukewarm Prospects and 4 in 10 of the Longshots — look at the ads at least once a month.

Engineers want classified employment ads to contain hard information about the job being advertised and are less concerned with stylistic features of the ads. Of primary importance are the job description, job title, and required qualifications and experience. Job location, company name and/or logo, and salary are also considered very important by a sizeable minority.

Blind ads are uniformly unpopular and, according to 8 out of 10 engineers, unlikely to generate a response. Modifying a blind ad by either guaranteeing a response or guaranteeing that the resume will not be sent to companies designated by the applicant doubles the projected response rate but still leaves about 6 out of 10 engineers unwilling to respond.

The instructions given in the ad for contacting the company may also affect the response. Engineers prefer making a telephone call or sending a resume rather than attending an open house, mailing in an application coupon, or calling a job hotline, and they prefer to deal with the department head or person responsible for the hiring rather than the personnel department.

Conclusions and Recommendations

a. Although most engineers express satisfaction with their current employer, many who are less satisfied are contemplating making a change. About one in five of the engineers surveyed is ripe for changing jobs in the immediate future, while almost half are likely to stay put.

b. More than two-thirds of the engineers are open to the idea of relocation if they were to change jobs, but they have significant concerns about relocation that need to be addressed. Paramount among these concerns are the financial tradeoffs in making a move, particularly those relating to housing and living costs.

c. When thinking about a new job, the primary concern of engineers -- particularly those most serious about a job change -- is finding challenging work. Salary and fringe benefits are important, of course, but do not constitute a driving force in the job search.

d. Newspaper employment advertisers can take a number of steps to optimize the effectiveness of their ads with engineers -- particularly those who are likely to change jobs soon or who are open to relocation:

(1) Ensure that ads are high in substantive information about the position being advertised, particularly the title of the job, a thorough description of the duties, the name and location of the company (engineers are unlikely to respond to blind ads), and sufficient information about required qualifications and salary to suggest the level and scope of the position.

(2) Ask for a response by telephone and/or by sending a resume to someone having both technical oversight responsibility for the position and a role in selecting the applicant.

(3) Run ads on more than one Sunday to improve the chances of reaching the hottest prospects, as well as those who may be waiting for just the right opportunity to make a move.

(4) In attempting to recruit engineers from other parts of the country, determine whether the relative cost of living in the area suggests the need for aggressive marketing and/or financial incentives to address engineers' concerns about the cost of living and housing.

INTRODUCTION

This is one of three concurrent reports prepared by the Research Department of the Newspaper Advertising Bureau on the recruitment of professionals in high demand. This document reports on a survey of engineers; the remaining reports address the recruitment of computer professionals and nurses.

A 1983 qualitative study[1] conducted by Blanka Eckstein and her firm, Social Science Applications, laid the foundation for the current survey. Eckstein's study drew on two focus groups and 17 individual telephone interviews, and her findings contributed to the definition of the issues addressed in the current quantitative study, conducted in the fall of 1985. Both studies examined the propensity of engineers to change jobs and to relocate, the features they seek or avoid in a job, their concerns about relocation, and the process they go through when thinking of changing jobs. The ultimate goal of this two-stage research effort was to learn how newspapers can more effectively meet the complementary needs of prospective employers and prospective employees through advertising that mirrors the job search process of engineers and addresses their major concerns.

The study was designed by Leon Aron, Michael Macht and Stuart Tolley of the NAB Research Department, with input from Blanka Eckstein of Social

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[1] See Job Search and Recruitment Advertising Study: Engineers and Computer Professionals, October, 1983.

Science Applications and Ira Gordon of the NAB. Ann Miksovic of Response Analysis Corporation supervised the data collection (including pretesting). We gratefully acknowledge the help and support throughout the study of the Association of Newspaper Classified Advertising Managers and its study task force, including Jim Roberts of the Chicago Tribune, Jack Ross of the Philadelphia Inquirer, and Gail Hyland of the Los Angeles Times.

Carolyn Eldred of the NAB Research Department analyzed the data and authored this report.

How the Study Was Done

Response Analysis Corporation was responsible for the data collection for this study, which took the form of a mail survey following telephone screening for eligibility.

Field work began in the early fall of 1985. Potential respondents were first selected from a national list of engineers representing eight different engineering specialties (chemical, metallurgical, nuclear, petroleum, aeronautic, electrical, mechanical, and industrial); because a large number of engineers appearing on the list were subsequently found to be ineligible for the survey, nominations were also accepted. Minimum eligibility requirements included:

- Speciality in one of the engineering fields noted above.
- Employment for at least three years as an engineer.
- Graduation from a four-year accredited college.
- Age of 21 to 55.

During the screening call, eligible respondents were asked if they would complete a mail questionnaire, and 202 engineers agreed to participate. Questionnaires were mailed to those who agreed within a few days of the telephone call, and a second questionnaire was sent to those who had not responded within two weeks of the original mailing. Completed, usable questionnaires were returned by 157 engineers. (A copy of the questionnaire used in the survey is available on request from the NAB Research Department.)

How to Read This Report

Detailed survey findings are presented in Section I. They are organized around five topics: (a) prospects for changing jobs and relocating, (b) what engineers look for in a job, (c) what engineers avoid in a job, (d) engineers' concerns about relocation, and (e) how engineers look for a job. While the findings in the text are intended to stand alone, detailed tabulations of the engineers' responses to the survey questionnaire accompany and support the analysis.

Much of the analysis is based on comparisons of engineers who differ with respect to: (1) their likelihood of changing jobs soon, and (2) their willingness to relocate for a new job. In the sample of 157 engineers, broken into several sub-groups for analytical purposes, small differences between sub-groups can occur through chance variation alone. And other things being equal, as sub-groups get smaller differences must be larger in order to rule out the role of chance. This report discusses only the larger differences that are unlikely to be the result of chance factors, while presenting complete comparisons among the groups in the tables. Differences that indicate that one group exhibits more or less of a given attribute than another generally encompass a degree of overlap between the groups, however.

Some of the findings also include information on the strength of the association between two variables. These are expressed as correlation coefficients that can range from -1.00 to +1.00, with a higher absolute value indicating a stronger relationship. Again, only relationships of a magnitude unlikely to be the result of chance are discussed.

I. DETAILED FINDINGS

A. Prospects for Changing Jobs and Relocating

1. Overview

We sought to characterize the engineers both in terms of their prospects for job change and -- particularly for those who might change jobs -- their willingness to consider a job that would require relocation. Overall, just 20% can be considered "Hot Prospects" for job change, and 45% are "Longshots." About a third (35%) are "Lukewarm Prospects." However, some prospects -- 30% of the total group -- specifically rule out jobs involving relocation. Nonetheless, about three-quarters (77%) of the "Hot Prospects" are willing to consider relocating. And, about 4 in 10 engineers (39%) are either Hot or Lukewarm Prospects for job change who are also to some degree willing to consider a job involving relocation.

The engineers were classified into the three groups of prospects based on their answers to three questions:

(1) Are you actually looking for a job with another employer now?

(2) If no: Are you thinking about looking for a job with another employer now?

(3) Realistically, how likely is it that you will change employers in the next year or so?

"Hot Prospects" are those who are either looking for a job or thinking about doing so and who believe it very or somewhat likely that they will change jobs within a year. "Longshots" are neither looking for a job nor thinking about doing so and consider a job change in the next year not at all likely.

The remaining engineers are the "Lukewarm Prospects": those looking or who might look for a job but who lack conviction that they will change jobs, and those who are neither looking nor thinking about looking for a job but who believe a job change is somewhat or very likely. The Lukewarm Prospects thus constitute a more heterogeneous and less distinctive group than the Hot Prospects and the Longshots, and their job changing intentions are less clear and more varied. For this reason, the report emphasizes comparisons between the Hot Prospects and Longshots. Where significant differences between these groups are reported, Lukewarm Prospects occupy an intermediate position somewhere between the two.

Those who would rule out the possibility of relocation were identified through a question about reasons for rejecting potential employment:

> People reject potential employment opportunities for a number of reasons. Please rate each of the factors listed below in terms of how likely you would be to reject potential employment because of that factor.

The engineers considered 14 separate factors and rated each on a 10-point scale anchored by the points "would never reject the job" (#1) and "would always reject the job" (#10). Those who rated the factor "relocation necessary" with an 8, 9, or 10 were judged to have rejected relocation, while the remaining engineers were assumed to be at least somewhat open to the possibility of relocation.

Many of the tables that follow divide the engineers into Hot Prospects, Lukewarm Prospects, and Longshots for job change and further subdivide the first two groups -- those who might change jobs -- into two groups according to whether or not they are willing to consider relocation.[2] Because some of the resulting sub-groups are quite small, the reader should concentrate primarily on comparisons among the prospect groups and not try to draw inferences about relocation within those groups. To illustrate some of the issues related to relocation, additional tables are provided that compare those who reject relocation with those who might relocate, without regard to prospect status.

2. Backgrounds of Prospects and Those Who Might Relocate

We examined both personal and professional characteristics of the engineers. (See Tables 1 through 4.) Those surveyed are overwhelmingly male (98%) and most are currently married (88% overall). About the same proportion have a spouse who works full-time (35%) as have a spouse who does not work outside the home (37%). About 6 in 10 currently have children under 18 in the home.

The primary personal characteristic differentiating the three prospect groups is age, with Hot Prospects being younger than the rest: 84% of the Hot Prospects are 45 or less, as compared with 58% of the Lukewarm

---

[2] In each table, the number of engineers falling into the various analytical groups is indicated at the top of each column. Because two engineers failed to respond to the relocation item used in the classification scheme, these column totals do not sum exactly to the overall total. Except where indicated, percentages shown in the tables are based on those engineers who actually responded to each item; in most cases item non-response was minimal.

Prospects and 60% of the Longshots. None of the personal characteristics examined -- including the employment status of the spouse -- distinguished those willing to consider relocation from those who reject the idea.

The engineers are evenly split between college graduates (49%) and those who have done graduate work (51%). Two-thirds of the group is accounted for by two specialties: mechanical engineering (36%) and electronics engineering (31%). About three-fourths (77%) earn at least $35,000 a year, and 69% have been with their current employer for more than five years. Almost all are either satisfied with their current employer (63%) or neutral (31%); just 6% are dissatisfied.

Hot Prospects and Longshots are further differentiated by their current salary, job tenure with their current employer, and their level of satisfaction with that employer. Nearly 3 in 10 of the Hot Prospects (29%) earn less than $35,000, compared to 1 in 10 (10%) of the Longshots, a fact that is probably a function of their relative youth. About half of the Hot Prospects (49%) have been with their current employer for five years or less, compared to 22% of the Longshots (and 33% of the Lukewarm Prospects); indeed, only about a fourth of the Hot Prospects (24%) have more than ten years tenure, compared to 59% of the Longshots (and 39% of the Lukewarm Prospects).

Hot Prospects are the least satisfied and Longshots the most satisfied with their current employers. Only a fifth (19%) of the Hot Prospects are satisfied with their current employer, and about a fourth (23%) are dissatisfied. (The remainder are neutral, neither particularly satisfied nor dissatisfied.) Dissatisfaction is rare or nonexistent among the Lukewarm Prospects and Longshots (6% and 0%, respectively), while satisfaction ranges from 57% among the Lukewarm Prospects to 86% among the Longshots.

The link between satisfaction and job tenure should not be surprising. Those who are dissatisfied are not only more interested in changing jobs but do in fact change jobs, leaving behind satisfied employees who remain with the same employer for many years.

Job dissatisfaction is also predictive of a willingness to consider relocation. Job dissatisfaction is greatest among the Hot Prospects who are willing to consider relocation (29%), followed by the Lukewarm Prospects who are willing to consider relocation (8%). All of the dissatisfied engineers said that they would consider relocation. At the same time, no one who rejected relocation outright expressed dissatisfaction with the current job.

Table 1

Engineers' Personal Characteristics

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Characteristic	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Age								
25 - 34	21%	32%	33%	29%	20%	21%	13%	17%
35 - 45	43	52	50	57	38	40	38	43
46 - 50	19	7	8	0	29	32	25	16
51 +	17	10	8	14	13	8	25	24
Sex								
Male	98	100	100	100	96	97	94	99
Female	2	0	0	0	4	3	6	1
Marital Status								
Currently married	88	84	83	86	87	87	94	90
Not currently married	12	16	17	14	13	13	6	10
Spouse's Employment Status								
Works full-time	35	42	38	57	40	50	19	28
Works part-time	18	16	21	0	16	13	25	20
Does not work outside the home	37	29	29	29	33	26	50	44
No answer/doesn't apply	10	13	13	14	11	11	6	8
Children Under 18 in Home								
None	42	35	39	17	43	46	31	44
One	24	17	13	33	26	27	25	25
Two	29	45	44	50	24	22	31	25
Three or more	6	3	4	0	7	5	13	6
Total Household Size								
One	7	7	4	14	7	3	13	7
Two	27	26	29	14	26	34	6	29
Three	25	19	17	29	26	29	19	27
Four	33	42	42	43	31	24	50	31
Five or more	8	7	8	0	11	11	13	6

Table 1 (Continued)

Source	Total	Hot Prospects All	Hot Prospects Consider Relocation? Yes	Hot Prospects Consider Relocation? No	Lukewarm Prospects All	Lukewarm Prospects Consider Relocation? Yes	Lukewarm Prospects Consider Relocation? No	Long-shots
BASE	157	31	24	7	55	38	16	71
Household Income								
Less than $35,000	9%	13%	13%	14%	11%	5%	25%	6%
$35,000 - $49,999	27	36	38	29	27	34	6	23
$50,000 or more	57	48	46	57	53	53	56	65
Not answered	7	3	4	0	9	8	13	7

Table 2

Engineers' Personal Characteristics by Propensity to Relocate

Characteristic	Total	Consider Relocation	Rule Out Relocation
BASE	157	108	47
Age			
25 - 34	21%	24%	13%
35 - 45	43	41	47
46 - 50	19	19	19
51 +	17	16	21
Sex			
Male	98	98	98
Female	2	2	2
Marital Status			
Currently married	88	87	92
Not currently married	12	13	9
Spouse's Employment Status			
Works full-time	35	35	34
Works part-time	18	19	15
Does not work outside the home	37	35	43
Not applicable/not answered	10	10	9
Children Under 18 in Home			
None	42	41	41
One	24	25	24
Two	29	28	30
Three or more	6	7	4
Total Household Size			
One	7	6	9
Two	27	28	23
Three	25	28	19
Four	33	29	45
Five or more	8	9	4
Household Income			
Less than $35,000	9	7	13
$35,000 - $49,999	27	28	23
$50,000 or more	57	57	60
Not answered	7	8	4

Table 3

Engineers' Professional Characteristics

Characteristic	Total	Hot Prospects			Lukewarm Prospects			Long-shots
			Consider Relocation?			Consider Relocation?		
		All	Yes	No	All	Yes	No	
BASE	157	31	24	7	55	38	16	71
Engineering Specialty								
Aeronautical	7%	3%	4%	0%	6%	9%	0%	10%
Chemical	9	13	13	14	10	14	0	8
Civil	1	0	0	0	0	0	0	2
Electronics	31	36	38	29	31	20	50	28
Industrial/Quality Control/Safety	5	13	13	14	6	9	0	2
Mechanical	36	32	29	43	39	40	38	36
Metallurgical	7	3	4	0	4	6	0	10
Petroleum	4	0	0	0	6	3	13	5
Education								
College Graduate	49	52	50	57	47	40	69	49
Graduate Work	51	48	50	43	53	61	31	51
Annual Salary								
Less than $35,000	15	29	29	29	15	11	25	10
$35,000 - $49,999	34	36	29	57	35	42	13	34
$50,000 or more	43	32	38	14	42	40	50	49
Not answered	7	3	4	0	9	8	13	7
Number of Job Changes in Engineering								
None	27	26	29	14	20	18	19	32
One	26	23	21	29	31	32	31	24
Two	20	19	25	0	26	29	19	17
Three	16	13	4	43	13	8	25	20
Four or more	11	19	21	14	11	13	6	7

Table 3 (Continued)

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Characteristic	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Years with Current Employer								
2 years or less	12%	26%	25%	29%	4%	3%	6%	11%
3 to 5 years	20	23	25	14	29	34	19	11
6 to 10 years	25	29	29	29	29	26	38	20
11 to 15 years	18	7	4	14	18	13	25	23
16 to 19 years	7	7	8	0	4	5	0	10
20 to 24 years	11	7	4	14	11	11	13	13
25 years or more	8	3	4	0	6	8	0	13
Satisfaction with Employer								
Satisfied (8, 9, & 10)	63	19	21	14	57	60	56	86
Neutral (4, 5, 6, & 7)	31	58	50	86	37	32	44	14
Dissatisfied (1, 2, & 3)	6	23	29	0	6	8	0	0

Question: How satisfied are you with your current employer on an overall basis? (10 point scale where 1 is extremely dissatisfied and 10 is extremely satisfied)

Table 4

Engineers' Professional Characteristics by Propensity to Relocate

Characteristic	Total	Consider Relocation	Rule Out Relocation
BASE	157	108	47
Engineering Specialty			
Aeronautical	7%	8%	7%
Chemical	9	12	4
Civil	1	1	0
Electronics	31	27	38
Industrial/Quality Control/Safety	5	7	2
Mechanical	36	34	40
Metallurgical	7	9	2
Petroleum	4	3	7
Education			
College Graduate	49	45	60
Graduate Work	51	55	40
Annual Salary			
Less than $35,000	15	12	23
$35,000 - $49,999	34	34	34
$50,000 or more	43	45	38
Not answered	7	8	4
Number of Job Changes in Engineering			
None	27	27	26
One	26	23	34
Two	20	24	13
Three	16	15	19
Four or more	11	11	9
Years with Current Employer			
2 years or less	12	11	13
3 to 5 years	20	21	15
6 to 10 years	25	26	23
11 to 15 years	18	16	21
16 to 19 years	7	9	2
20 to 24 years	11	8	17
25 years or more	8	8	9

Table 4 (Continued)

Characteristic	Total	Consider Relocation	Rule Out Relocation
BASE	157	108	47
Satisfaction with Employer			
Satisfied (8, 9, & 10)	63%	63%	64%
Neutral (4, 5, 6, & 7)	31	28	36
Dissatisfied (1, 2, & 3)	6	9	0

Question: How satisfied are you with your current employer on an overall basis? (10 point scale where 1 is extremely dissatisfied and 10 is extremely satisfied)

B. What Engineers Look for in a Job

1. Overview

The engineers were queried about 23 different features that they might look for in a job. They were asked to rate the relative importance of each feature and then to identify those features they would rank first, second, and third in importance:

> (1) RATING QUESTION: The list below contains a number of features that people like yourself often look for in a job. Please rate each one in terms of how important it is to you when looking for a job or when considering a new job.
>
> (Ratings were made on a 10-point scale anchored by "of no importance whatsoever" [#1] and "absolutely essential" [#10]. Ratings of 8, 9, and 10 are treated here as features important to the respondent.)
>
> (2) RANKING QUESTION: Please look over the list of items [rated above]. Select the three items that are most important to you.

The ratings provided the engineers the opportunity to endorse any feature that is important to them, while the rankings forced them to select the three "primary" factors that would be most critical in their assessment of a new job.

There was considerable agreement between the free choice of the ratings and the forced choice of the rankings. (See Tables 5 through 8.) Put another way, the four job features rated most highly accounted for the bulk of the first-, second-, and third-place rankings (termed "primary" in the discussion that follows). These features include: (1) challenging work, rated important by 89% and primary by 53%; (2) company integrity, rated important by 85% and ranked primary by 40%; (3) competitive salary, rated important by 76% and ranked primary by 45%; and (4) opportunities for advancement, rated important by 74% and ranked primary by 36%.

A number of job features frequently rated as important (i.e., by 40% to 70%), while not frequently ranked as primary, were nonetheless named by at least 10% of the engineers as being of primary importance. These include job stability, high caliber co-workers, the city or metropolitan area where the job is located, product integrity, the use of state-of-the-art technology, and medical benefits. Other features, including a variety of fringe benefits and working conditions, were endorsed by some engineers as important but were rarely deemed to be of primary importance.

With the exception of salary, engineers appear to be more concerned about intrinsic features of the job and its performance than about extrinsic features like working conditions and fringe benefits. Both concerns are present, however, and the interrelationships among each engineer's ratings of the 23 job features provide evidence for these two distinct motivational themes. There are substantial inter-correlations among ratings for a competitive salary, pension plan, medical benefits, dental benefits, other fringe benefits, stock options, profit-sharing, and bonuses. Challenging work stands apart and enjoys its only substantial correlation with state-of-the-art technology, (along with small but significant correlations with high caliber co-workers, company integrity, product integrity, and company reputation in the field).

2. Features Important to Prospects and Those Who Might Relocate

In their ratings of important features, the three groups of prospects look quite similar. Overall, it may be that Longshots are more demanding than Hot Prospects, but they place significantly more emphasis on only a few job features: job stability, high caliber co-workers, and a good office atmosphere.

In the ordering of their rankings of the three primary features, the prospect groups are also generally similar. However, the greater importance accorded opportunities for advancement differentiates the Hot Prospects from the Longshots, with 55% versus 25%, respectively, naming that job feature as primary. (Lukewarm Prospects hold an intermediate position, with 35% of this group emphasizing advancement opportunities.) Overall, Hot Prospects are somewhat more likely than other engineers to concentrate their votes on the top four factors (to the relative exclusion of the remaining 19), and they place an equally high emphasis on challenging work, competitive salary, and opportunities for advancement.

Engineers who are willing to consider relocation emphasize somewhat different job features than do those who rule out relocation. The former group is more likely to rate challenging work as important (94% versus 79%), while those who reject relocation are more concerned about medical benefits (77% versus 53%) and (not surprisingly) the location of the job (55% versus 36%).

In their ranking of the primary features, the two groups agree on the four most important features but place different emphases on challenging work and salary: 60% of those who might relocate view challenging work as first, second, or third in importance, compared with 34% of those who will not relocate; 66% of the latter place competitive salary at the top of the list compared to 35% of those who would consider a move.

Table 5

Engineers' Ratings of Features Wanted in a Job*

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Feature	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Challenging work	89%	94%	96%	86%	87%	90%	88%	88%
Company integrity	85	74	71	86	84	84	88	91
Competitive salary	76	77	71	100	75	74	75	75
Opportunities for advancement	74	71	67	86	76	76	75	73
Product integrity	67	65	63	71	73	68	88	64
Medical benefits	60	58	54	71	60	53	81	61
Recognition by superiors	59	55	63	29	64	66	56	57
Job stability	56	42	38	57	55	58	50	64
High caliber co-workers	48	29	25	43	49	47	56	55
State-of-the-art technology	47	39	38	43	44	47	38	54
Pension plan	47	42	33	71	42	37	56	52
City or metropolitan area in which job is located	42	32	25	57	49	42	69	41
Company reputation in the field	38	32	25	57	35	42	19	44
Good office atmosphere	38	23	21	29	40	34	56	44
Dental care benefits	32	36	33	43	35	29	50	29
Comfortable commute	31	23	17	43	35	34	31	32
Profit-sharing	28	26	25	29	31	29	31	26
Bonuses	25	19	17	29	31	26	38	23

Table 5 (Continued)

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Feature	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Office privacy	24%	19%	17%	29%	27%	21%	44%	23%
Flexible work schedule	23	26	21	43	24	24	25	22
Assistance with continuing education	21	23	25	14	22	24	13	20
Fringe benefits other than income or health	18	23	17	43	24	21	25	12
Stock options	18	19	17	29	20	18	25	16

*Percentage of respondents giving a rating of 8, 9, or 10 on a ten-point scale, where 10 is "absolutely essential" and 1 is "of no importance whatsoever."

Question: Please rate each item in terms of how important it is to you when looking for a job or when considering a new job.

Table 6

Job Features Ranked First, Second, or Third in Importance by Engineers*

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Feature	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Challenging work	53%	55%	63%	29%	54%	57%	44%	51%
Competitive salary	45	55	42	100	41	35	56	44
Company integrity	40	32	38	14	37	43	25	45
Opportunities for advancement	36	55	58	43	35	35	38	28
Job stability	19	16	17	14	17	16	19	22
High caliber co-workers	18	10	8	14	19	16	19	22
City or metropolitan area in which job is located	17	26	21	43	13	8	25	16
Product integrity	13	10	13	0	17	22	6	12
Recognition by superiors	12	7	8	0	15	19	6	13
Medical benefits	10	7	4	14	9	5	19	13
State-of-the-art technology	10	16	17	14	7	11	0	10
Pension plan	8	0	0	0	11	8	19	9
Company reputation in the field	5	0	0	0	4	5	0	7
Good office atmosphere	3	3	4	0	6	3	6	1
Comfortable commute	3	0	0	0	6	3	13	1
Bonuses	3	0	0	0	6	5	6	3
Fringe benefits other than income or health	2	3	4	0	2	3	0	1

Table 6 (Continued)

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Feature	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Office privacy	1%	0%	0%	0%	2%	3%	0%	1%
Flexible work schedule	1	0	0	0	2	3	0	1
Assistance with continuing education	1	3	0	14	0	0	0	0
Stock options	1	3	4	0	0	0	0	0

*Percentage ranking each feature as either first, second, or third in overall importance.

Question: Select the three items that are most important to you (in a job).

Table 7

Engineers' Ratings of Features Wanted in a Job By Propensity to Relocate

Feature	Total	Consider Relocation	Rule Out Relocation
BASE	157	108	47
Challenging work	89%	94%	79%
Company integrity	85	84	89
Competitive salary	76	77	72
Opportunities for advancement	74	75	70
Product integrity	67	68	66
Medical benefits	60	53	77
Recognition by superiors	59	63	49
Job stability	56	56	57
High caliber co-workers	48	47	51
State-of-the-art technology	47	51	57
Pension plan	47	42	57
City or metropolitan area in which job is located	42	36	55
Company reputation in the field	38	41	32
Good office atmosphere	38	37	40
Dental care benefits	32	28	43
Comfortable commute	31	26	40
Profit-sharing	28	30	21
Bonuses	25	23	28
Office privacy	24	22	30
Flexible work schedule	23	23	23
Assistance with continuing education	21	24	13
Fringe benefits other than income or health	18	16	21
Stock options	18	18	19

*Percentage of respondents giving a rating of 8, 9, or 10 on a ten-point scale, where 10 is "absolutely essential" and 1 is "of no importance whatsoever."

Question: Please rate each item in terms of how important it is to you when looking for a job or when considering a new job.

Table 8

Job Features Ranked First, Second, or Third in Importance by Engineers* by Their Propensity to Relocate

Feature	Total	Consider Relocation	Rule Out Relocation
BASE	157	108	47
Challenging work	53%	60%	34%
Competitive salary	45	36	66
Company integrity	40	43	32
Opportunities for advancement	36	37	34
Job stability	19	16	26
High caliber co-workers	18	19	15
City or metropolitan area in which job is located	17	12	28
Product integrity	13	16	6
Recognition by superiors	12	16	4
Medical benefits	10	6	21
State-of-the-art technology	10	12	6
Pension plan	8	7	11
Company reputation in the field	5	6	2
Good office atmosphere	3	3	2
Comfortable commute	3	1	6
Bonuses	3	3	4
Fringe benefits other than income or health	2	3	0
Office privacy	1	2	0
Flexible work schedule	1	2	0
Assistance with continuing education	1	0	2
Stock options	1	1	0

*Percentage ranking each feature as either first, second, or third in overall importance.

Question: Select the three items that are most important to you (in a job).

C. What Engineers Avoid in a Job

1. Overview

Most engineers would reject a job if they believed that the company provides an inferior product or service (84%) or that layoffs are too likely (73%). Other considerations that would lead many to reject a job include a company that is undercapitalized or has poor R&D funding (52%), management that is not people-oriented (47%), and routine work projects (45%). Interestingly, a less than competitive salary ranks farther down the list (29%), along with relocation (30%), uncomfortable commute (32%), insufficient benefits (32%), and the city or metropolitan area in which the job is located (36%). Cited by less than a fourth of the engineers were absence of state-of-the-art technology (23%), a poor impression of the interviewer (22%), and the size of the company (too large -- 11%, too small - 8%). (See Tables 9 and 10.)

2. Factors to be Avoided by Prospects and Those Who Might Relocate

By and large the three prospect groups hold similar views about the features they would seek to avoid in a job. Hot Prospects are more likely than Longshots, however, to voice concern about a company that is undercapitalized or has poor R&D funding. And, compared to those who might relocate, engineers who reject the idea of relocation are also more likely to reject a job for other reasons as well: the city or metropolitan area in which the job is located (68% versus 22%); an uncomfortable commute (53% versus 22%); and a less than competitive salary level (45% versus 22%).

Specific considerations that would lead some engineers to reject a job reflect a number of general underlying themes. For instance, an overall concern with location is manifested in substantial correlations between ratings on the city or metropolitan area in which the job is located and both an uncomfortable commute (r = .52) and the need for relocation (r = .48). A compensation/fringe theme is evidenced by a substantial correlation between insufficient benefits and a lower than competitive salary level (r = .47). And a "cutting edge" theme is suggested by a substantial correlation between ratings on the absence of state-of-the-art technology and routine work projects (r = .49).

Table 9

Engineers' Ratings of Features to be Avoided in a Job*

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Feature	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Company provides inferior product or service	84%	73%	87%	71%	83%	87%	75%	84%
Layoffs too likely	73	73	70	86	72	68	81	74
Company undercapitalized/ poor R&D funding	52	63	65	57	59	62	50	42
Management not people-oriented	47	50	48	57	42	46	31	49
Routine work projects	45	33	26	57	49	57	31	46
City or metropolitan area in which job is located	36	43	26	100	30	22	50	38
Insufficient benefits	32	43	39	57	30	30	31	29
Uncomfortable commute	32	30	17	71	26	19	44	36
Relocation necessary	30	23	0	100	30	0	100	35
Somewhat lower than competitive salary level	29	37	26	71	21	14	38	32
Not using state-of-the-art techniques/technology	23	20	13	43	21	24	13	26
Interviewer made poor impression	22	30	26	43	25	24	25	17
Company too large	11	7	9	0	2	3	0	20
Company too small	8	7	4	14	9	8	13	7

*Percentage giving a rating of 8, 9, or 10 on a ten-point scale, where 10 signifies "would always reject the job" and 1 signifies "would never reject the job" (for that reason).

Question: Please rate each of the factors listed below in terms of how likely you would be to reject potential employment because of that factor.

Table 10

Engineers' Ratings of Features to be Avoided in a Job By Propensity to Relocate*

Feature	Total	Consider Relocation	Rule Out Relocation
BASE	157	108	47
Company provides inferior product or service	84%	85%	81%
Layoffs too likely	73	69	83
Company undercapitalized/ poor R&D funding	52	57	40
Management not people-oriented	47	49	43
Routine work projects	45	47	40
City or metropolitan area in which job is located	36	22	68
Insufficient benefits	32	31	34
Uncomfortable commute	32	22	53
Relocation necessary	30	0	100
Somewhat lower than competitive salary level	29	22	45
Not using state-of-the-art techniques/technology	23	23	23
Interviewer made poor impression	22	21	26
Company too large	11	9	17
Company too small	8	8	9

*Percentage giving a rating of 8, 9, or 10 on a ten-point scale, where 10 signifies "would always reject the job" and 1 signifies "would never reject the job" (for that reason).

Question: Please rate each of the factors listed below in terms of how likely you would be to reject potential employment because of that factor.

D. Engineers' Concerns about Relocation

1. Overview

All of the engineers, whether or not they indicated a willingness to consider relocation, were asked what might be involved in a decision to relocate:

> Suppose you were considering a job involving relocation. Please rate all the features listed below on how important they would be to you in deciding to accept a job offer involving relocation.

The engineers rated each of 23 factors on a ten-point scale ranging from "not at all important to accepting job requiring relocation" (#1) to "absolutely essential to accepting a job requiring relocation" (#10). If an engineer rated a factor as 8, 9, or 10, that factor was assumed to be important to his or her decision to relocate.

Two factors are considered paramount by engineers: the spouse's attitude toward relocation, cited as important by 78%, and relocation assistance (e.g., paying moving expenses), cited by 75%. Other important factors include a substantial salary increase (61%), same or better quality of housing (58%), good school for children (52%), a good, safe neighborhood to work in (51%), and immediate advancement in position, rank, or title (50%). (See Tables 11 and 12.)

The importance of the role of the spouse in the decision to accept a job requiring relocation was confirmed by a question that specifically addressed this issue:

> How much influence would your spouse have in your decision to accept a job involving relocation: Would you say the feelings of your spouse would be one of the most important factors, would have some influence, or would have almost no influence in the decision?

Three-fourths of the engineers said their spouse's feelings would be one of the most important factors in a job requiring relocation, and 18% said their spouse's influence would have some influence. Only one respondent said the spouse's feelings would have almost no influence. But the various analytical groups do not differ significantly in the importance they place on the spouse's views.

Although the attitude of the spouse was the most important factor mentioned, job availability for the spouse was considered important by only 22%, and help in finding suitable employment for the spouse was mentioned by only 13%.

Correlations among the 23 factors suggest that a few themes predominate when engineers think about relocation. One theme has to do with the economic costs of relocating and revolves around the issue of housing. Substantial inter-correlations exist among a comparably (or lower) priced house or apartment, help in finding a new house or apartment, help in financing the purchase of a new home, the same or lower cost of living in the new location, same or lower mortgage rates in the new location, and difficulty selling the present house or apartment.

A second theme has to do with the ambience of the new location and the leisure-time pursuits it provides. Thus, substantial correlations exist among such variables as proximity of city/cultural life, availability of recreational facilities, ease of getting away to mountains, lakes, etc., and clean air. There is also a "children's theme," as exemplified by correlations between a good school for children, children's attitude toward relocation, and age of the children, and a "spouse employment theme," as exemplified by a high correlation between job availability for the spouse and help in finding suitable employment for the spouse.

2. Considerations Important to Prospects and Those Who Might Relocate

Although expressing generally similar concerns about relocation, members of the three prospect groups tend to view a few issues differently. Hot Prospects -- those seriously bent on a change of jobs -- find the practical problems of relocation to be more salient than do those who see little likelihood of changing jobs. Hot Prospects differ from Longshots in their greater concern about:

- relocation assistance (93% versus 69%),
- difficulty selling the present house or apartment (53% versus 31%),
- help financing the purchase of a new home (43% versus 17%),
- job availability for the spouse (43% versus 13%), and
- availability of alternate employment in the area (33% versus 13%).

At the same time, Hot Prospects are less concerned about climate than are Longshots (17% versus 40%).

As previously noted, 30% of the engineers would always or almost always reject a job requiring relocation, while 70% are at least willing to consider relocating. The former group's reluctance to move is reflected in the greater weight they place on a number of considerations involved in relocation: a substantial salary increase (85% versus 51%), housing of comparable quality (79% versus 49%), immediate advancement (66% versus 42%), difficulty selling their present home (51% versus 29%), climate (55% versus 23%), and the children's feelings about relocation (51% versus 21%).

3. Relocation Destinations

The engineers were given the opportunity to indicate their preferences for states as potential places to live:

> (1) If you were to relocate, please specify which states you would most prefer to go to.
>
> (2) If you were to relocate, please specify which states you would not go to.

As a group, the engineers have stronger feelings about states that they would avoid than about those they would prefer. (See Table 13.) There are 11 states or territories that at least 20% of the engineers would avoid, but only six that at least 20% would prefer; across all states, the median "avoidance rate" is 13% compared with a median "preference rate" of 7%.

The states to be avoided are Alabama (32%), Mississippi (31%), Alaska (29%), North Dakota (29%), New Jersey (27%), the District of Columbia (26%), New York (26%), Louisiana (25%), South Dakota (20%), Kansas (20%), and Nebraska (20%). The preferred states include California (38%), Colorado (34%), Florida (26%), North Carolina (24%), Texas (20%), and Massachusetts (20%).

A number of states elicit fairly strong positive and negative reactions from the engineers. These include California (preferred by 38% and avoided by 14%), Florida (preferred by 26% and avoided by 19%), Georgia (both preferred and avoided by 18%), Massachusetts (preferred by 20% and avoided by 16%), and New York (preferred by 13% and avoided by 26%).

Concerns about the cost of living and housing may play a role in the engineers' ambivalent or negative reactions to some states. The January 5, 1988 Wall Street Journal reports that employees are increasingly resisting transfers to high-cost cities. New York, Los Angeles, Boston, San Francisco, and Washington head the list of metropolitan areas they avoid.

Table 11

Engineers' Ratings of Factors Important for Relocation Decisions*

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Factor	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Spouse's attitude toward relocation	78%	80%	78%	86%	76%	68%	94%	80%
Relocation assistance, e.g. paying moving expenses	75	93	91	100	72	73	69	69
Substantial salary increase	61	70	65	86	59	46	88	60
Same or better quality of housing	58	53	48	71	57	49	75	61
Good school for children	52	50	48	57	43	43	44	59
Good, safe neighborhood to work in	51	47	48	43	55	46	75	50
Immediate advancement in position/rank/title	50	50	39	86	45	35	69	53
Clean air	43	47	44	57	43	41	50	41
Difficulty of selling the present house/apartment	35	53	57	43	30	19	56	31
Climate	33	17	13	29	34	24	56	40
Ease of getting away to mountains, lakes, etc.	32	30	30	29	38	43	25	29
Availability of recreational facilities	31	43	44	43	30	30	31	26
Children's attitude toward relocation	30	20	9	57	34	24	56	31
Proximity of city/cultural life	28	33	30	43	26	24	31	27
Help in financing the purchase of a new home	25	43	30	86	25	19	38	17

Table 11 (Continued)

Factor	Total	Hot Prospects			Lukewarm Prospects			Long-shots
			Consider Relocation?			Consider Relocation?		
		All	Yes	No	All	Yes	No	
BASE	157	31	24	7	55	38	16	71
Comparable or lower cost of a new house/apartment	24%	33%	30%	43%	21%	16%	31%	23%
Job availability for spouse	22	43	39	57	23	27	13	13
Same or lower mortgage rates in new location	22	30	26	43	17	14	25	23
Same or lower cost of living in new location	22	33	30	43	19	14	31	20
Availability of courses at educational institutions	20	30	35	14	17	19	13	19
Help in finding a new house or apartment	20	27	26	29	15	11	25	20
Many potential employers/ availability of alternate employment in the area	18	33	17	86	17	11	31	13
Age of the children	18	10	13	0	19	14	31	20
Help in finding suitable employment for spouse	13	17	9	43	17	19	13	30
Proximity of stores/ shopping centers	11	10	4	29	9	11	6	11

*Percentage giving a rating of 8, 9, or 10 on a ten-point scale, where 10 signifies "absolutely essential to accepting a job requiring relocation" and 1 signifies "not at all important to a job requiring relocation."

Question: Please rate all the features listed below on how important they would be to you in deciding to accept a job offer involving relocation.

Table 12

Engineers' Ratings of Factors Important for Relocation Decisions* By Propensity to Relocate

Factor	Total	Consider Relocation	Rule Out Relocation
BASE	157	108	47
Spouse's attitude toward relocation	78%	73%	89%
Relocation assistance, e.g., paying moving expenses	75	71	75
Substantial salary increase	61	51	85
Same or better quality of housing	58	49	79
Good school for children	52	49	60
Good, safe neighborhood to work in	51	49	57
Immediate advancement in position/rank/title	50	42	66
Clean air	43	40	51
Difficulty of selling the present house/apartment	35	29	51
Climate	33	23	55
Ease of getting away to mountains, lakes, etc.	32	31	34
Availability of recreational facilities	31	28	38
Children's attitude toward relocation	30	21	51
Proximity of city/cultural life	28	29	28
Help in financing the purchase of a new home	25	19	38
Comparable or lower cost of a new house or apartment	24	19	36
Job availability for spouse	22	22	23

Table 12 (Continued)

Factor	Total	Consider Relocation	Rule Out Relocation
BASE	157	108	47
Same or lower mortgage rates in new location	22%	16%	36%
Same or lower cost of living in new location	22	17	34
Availability of courses at educational institutions	20	23	15
Help in finding a new house or apartment	20	16	28
Many potential employers/availability of alternate employment in the area	18	11	36
Age of the children	18	16	21
Help in finding suitable employment for spouse	13	13	13
Proximity of stores/shopping centers	11	8	17

*Percentage giving a rating of 8, 9, or 10 on a ten-point scale, where 10 signifies "absolutely essential to accepting a job requiring relocation" and 1 signifies "not at all important to a job requiring relocation."

Question: Please rate all the features listed below on how important they would be to you in deciding to accept a job offer involving relocation.

Table 13

Engineers' Ratings of States for Relocation*

State	Avoid	Prefer	State	Avoid	Prefer
Alabama	32%	3%	Maine	13%	6%
Mississippi	31	2	Ohio	13	6
Alaska	29	3	Wisconsin	13	8
North Dakota	29	1	Minnesota	13	8
New Jersey	27	9	Pennsylvania	13	12
District of Columbia	26	3	Hawaii	13	14
New York	26	13	Connecticut	13	17
Louisiana	25	5	Texas	13	20
South Dakota	20	1	Indiana	12	2
Kansas	20	2	Nevada	12	4
Nebraska	20	3	Missouri	12	4
Arkansas	19	3	Delaware	11	5
Florida	19	26	Kentucky	11	5
Georgia	18	18	Tennessee	10	11
Iowa	17	1	New Mexico	10	12
Michigan	17	6	Utah	9	6
Oklahoma	16	3	New Hampshire	9	16
Montana	16	6	South Carolina	9	17
Massachusetts	16	20	Maryland	8	12
Illinois	15	8	Vermont	8	13
Wyoming	14	3	Arizona	8	17
Idaho	14	6	Washington	8	19
Virgin Islands	14	6	Oregon	7	18
California	14	38	Virginia	6	17
West Virginia	13	1	North Carolina	6	24
Rhode Island	13	5	Colorado	5	34

Percentage naming each state.

Question: If you were to relocate, please specify which states you (a) would most prefer to go to, (b) would not go to.

E. HOW ENGINEERS LOOK FOR A JOB

1. Newspapers and Other Sources of Employment Information

In exploring potential employment opportunities, engineers make use of a number of sources of information. Information about their preferences for and use of alternative sources came from two questions:

> (1) Think of your own experience with the sources of employment information and of anything you might have heard from others. Please rate each item listed below in terms of how useful it is or would be as a source of employment information. (Four-point scale anchored by "very useful" and "not at all useful.")
>
> (2) What one source of employment information do you/would you use most often when looking for a job, when thinking of changing jobs, or when just monitoring job opportunities?

Engineers generally rated more than one source of information as very useful. Among Hot Prospects, the very useful rating was most often applied to word of mouth and personal contacts (83%), which received more than double the endorsement given the next two most popular sources, newspaper employment ads (33%) and employment/executive search/placement agencies (33%). Ads in trade publications or journals were deemed useful by 27%, and employee referral programs by 17%. (See Table 14.)

Overall, the same rank order of sources emerged when the Hot Prospects were asked to name the one source of information they do or would use most often. Word of mouth/personal contacts came first (32%), followed by newspaper ads (23%), agencies (23%), and journal ads (19%). While less committed to a change in employment, Lukewarm Prospects and Longshots tended to iew the information sources similarly. (See Table 15.)

Table 14

Percentage of Engineers Rating Each Source as "Very Useful"

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Source	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Word of mouth/personal contacts	71%	83%	83%	86%	67%	63%	75%	68%
Employment/search/ placement agencies	35	33	30	43	31	34	25	39
Newspaper employment ads	26	33	26	57	22	19	31	26
Ads in trade publications or journals	25	27	22	43	27	31	19	23
Employee referral program	14	17	17	14	6	6	6	18
Professional directories	10	3	4	0	14	16	13	10
Open houses	6	13	17	0	2	0	6	7
Job fairs	4	7	9	0	2	3	0	3
Computerized employment data banks	2	7	9	0	0	0	0	2
Employment advertising through the mail	2	7	9	0	0	0	0	2
State employment services	1	0	0	0	0	0	0	2

Question: Please rate each item listed below in terms of how useful it is or would be as a source of employment information. (Four-point scale from very useful to not at all useful.)

Table 15

Job Information Source Used Most Often by Engineers

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Source	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Word of mouth/personal contacts	36%	32%	33%	29%	33%	29%	38%	41%
Employment/search/ placement agencies	24	23	21	29	22	18	31	27
Ads in trade publications or journals	21	19	21	14	31	40	13	14
Newspaper employment ads	16	23	21	29	13	11	19	16
Professional directories	1	0	0	0	0	0	0	1
Computerized employment data banks	1	3	4	0	0	0	0	0
Referral programs	1	0	0	0	0	0	0	1
Other	1	0	0	0	2	3	0	0

Question: What one source of employment information do you/would you use most often when looking for a job, when thinking of changing jobs, or when just monitoring job opportunities?

2. Use of the Newspaper as a Source of Employment Information

Like most educated Americans, engineers read the newspaper with great regularity. At least two-thirds read the paper on weekdays (including Saturday), and nearly nine out of ten (89%) read a Sunday paper. (See Table 16.)

Interestingly, Hot Prospects are least likely -- and Longshots most likely -- to read the newspaper on weekdays. Thus, the difference between weekday and Sunday readership levels is much greater for Hot Prospects than for the other two groups, almost doubling from a Monday-Saturday average of 48%, to 94% on Sunday. (By contrast, Lukewarm Prospects increase their readership from 70% on weekdays to 89% on Sundays, and Longshots, from 79% to 87%.) The use of Sunday employment ads by Hot Prospects may explain the magnitude of the difference between their weekday and Sunday readership levels.

Engineers in the three groups differ little with respect to the sections of the newspaper they usually read or look at. (See Table 17.) Although readership of general news (87%) and business (83%) is uniformly high, the local news section, which is read by 79% overall, is less likely to be read by Hot Prospects than by Longshots. The majority of Hot Prospects read the careers section, and they do so at a rate two to three times that of the other two groups. In addition, half to two-thirds of the engineers in all three groups read the sports and editorial sections. Interestingly, only about one engineer in four reads a science section, but this rate may reflect the uneven availability of science sections more than the engineers' interest.

Table 16

Days of the Week Engineers Usually Read or Look at the Newspaper*

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Day of the Week	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Monday	68%	48%	58%	14%	70%	73%	63%	76%
Tuesday	70	48	54	29	74	78	63	76
Wednesday	70	52	63	14	70	73	63	79
Thursday	70	48	54	29	70	73	63	79
Friday	72	48	54	29	70	76	56	84
Saturday	67	45	46	43	65	70	50	77
Sunday	89	94	92	100	89	87	94	87

*Percentage reading or looking at the paper on each day. (Processing of information in the newspaper typically includes both scanning and reading.)

Question: On what days of the week do you usually read or look at a daily or weekend newspaper? (Circle all that apply).

Table 17

Sections of the Newspaper Engineers Usually Read or Look At*

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Section	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
General news	87%	87%	96%	57%	86%	90%	81%	89%
Business	83	81	75	100	78	79	81	89
Local news	79	65	67	57	75	79	69	89
Sports	58	52	46	71	53	55	44	66
Editorial	57	65	67	57	53	55	50	57
Entertainment	43	45	46	43	40	45	31	44
Weekend magazine	42	32	25	57	44	50	31	46
Careers	31	61	63	57	26	29	19	21
Travel	35	29	25	43	29	32	19	43
Science	26	26	25	29	26	29	19	27
Lifestyle	21	16	17	14	20	24	13	24
Home	17	13	8	29	13	16	6	23
Food	11	10	8	14	13	16	6	10
Fashion	6	7	4	14	7	8	6	6

Question: What sections of the newspaper do you usually read or look at? (Circle all that apply.)

Although engineers rate word of mouth or personal contacts as the best general source of employment information, the behavior of Hot Prospects indicates a crucial role for newspaper classified advertising. More than 8 out of 10 (81%) read newspaper employment ads at least once every couple of weeks; 55% read classified employment ads once a week or more. Even Lukewarm Prospects and Longshots read employment ads, however, with 52% and 43%, respectively, looking at ads once a month or more. As has been noted in previous studies, newspaper employment ads provide a means of keeping up-to-date on the employment market, whether or not one is actively looking for a job. (See Table 18.)

The Sunday paper is the most popular source of classified employment ads: when reviewing employment classified ads, 87% of the engineers look in the Sunday paper; weekdays are also mentioned by about 10% of Hot Prospects and Lukewarm Prospects and by about 5% of Longshots. (See Table 19.)

Engineers primarily look in the classified and business sections of the newspaper for employment ads; the careers section and science section lag far behind those two. When asked in what sections of the paper they usually look for employment ads, 87% of the engineers indicated the classified section and 70% noted the business section. Careers and science were named by 37% and 9%, respectively. (See Table 20.) When the question was amended to include sections where the engineers occasionally looked for employment ads, every section was found to enjoy somewhat greater exposure. Hot Prospects place less emphasis on the classified section than do the other groups, however. (See Table 21.)

Table 18

Engineers' Frequency of Reading Employment Classified Ads in the Newspaper*

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Frequency	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Several times a week	6%	26%	33%	0%	2%	0%	6%	1%
Once a week	15	29	25	43	13	16	6	11
Once every couple of weeks	21	26	17	57	22	18	25	17
Once a month	12	3	4	0	15	16	13	14
Once every couple of months or less	46	16	21	0	49	50	50	56

*Percentage who report reading at each frequency.

Question: How often do you read or look at the employment ads in the help wanted section of the newspaper?

Table 19

Days of the Week Engineers Usually Read or Look at Employment Ads in the Newspaper

Day of the Week	Total	Hot Prospects All	Hot Prospects Consider Relocation? Yes	Hot Prospects Consider Relocation? No	Lukewarm Prospects All	Lukewarm Prospects Consider Relocation? Yes	Lukewarm Prospects Consider Relocation? No	Long-shots
BASE	157	31	24	7	55	38	16	71
Monday	9%	16%	21%	0%	10%	11%	7%	3%
Tuesday	9	13	17	0	12	17	0	5
Wednesday	8	10	13	0	10	14	0	5
Thursday	7	7	8	0	10	11	7	5
Friday	9	16	21	0	8	11	0	5
Saturday	10	13	13	14	12	17	0	7
Sunday	87	94	96	86	82	77	93	86

*Percentage reading the classified ads on each day.

Question: On what days of the week do you usually read or look at employment ads in a newspaper? (Circle all that apply).

Table 20

Sections of the Newspaper Engineers Usually Look at for Employment Ads*

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Section	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Classified	87%	68%	71%	57%	91%	92%	94%	92%
Business	70	74	71	86	70	68	75	68
Careers	37	48	50	43	33	41	19	34
Science	9	16	21	0	2	3	0	11
Sports	4	3	4	0	7	5	13	2
General news	3	3	4	0	2	3	0	3
Local news	3	3	4	0	2	3	0	3
Home	1	3	4	0	0	0	0	2
Entertainment	1	0	0	0	0	0	0	2

*Percentage noting each section.

Question: Employment advertising is usually in the classified section or in the business section. However, sometimes employment ads are in other parts of the paper. Please circle the sections or types of pages you usually look at if and when you are looking for employment ads. (Circle all that apply.)

Table 21

Sections of the Newspaper Engineers Usually or Occasionally Look at for Employment Ads*

		Hot Prospects			Lukewarm Prospects			
			Consider Relocation?			Consider Relocation?		
Section	Total	All	Yes	No	All	Yes	No	Long-shots
BASE	157	31	24	7	55	38	16	71
Classified	90%	71%	75%	57%	94%	95%	100%	95%
Business	83	84	79	100	87	84	94	80
Careers	51	55	58	43	56	54	56	46
Science	23	36	42	14	19	16	25	22
Local news	17	19	21	14	20	16	31	12
General news	13	16	13	29	9	5	19	14
Sports	9	3	4	0	17	11	31	5
Home	2	3	4	0	0	0	0	3
Entertainment	2	0	0	0	0	0	0	5

*Percentage noting each section -- usually or occasionally.

Questions: Please circle the sections or types of pages you usually look at if and when you are looking for employment ads . . . . Now, circle any other sections or types of pages you might occasionally look at for employment ads. (Circle all that apply.)

3. Engineers' Response to Characteristics of Employment Ads

What happens when the engineer opens a section of the newspaper to employment ads? We asked about the various ad characteristics that might attract his or her attention to the ad:

> How important are the features listed below in attracting your attention to a newspaper employment ad? (13 characteristics rated on a four-point scale anchored by "very important" and "not at all important")

No feature was rated very important by more than two-thirds of the engineers. (See Table 22.) However, the features most often deemed very important were those that conveyed solid substantive information about the position (as opposed to stylistic features and "rhetoric"). Among the most critical are the job description (62%), job title (59%), required qualifications and experience (54%), and job location (44%). About one-third (34%) said that the company name and/or logo was very important, a sentiment consistent with the findings discussed below on the unpopularity of blind ads. About one-quarter said that salary is very important (26%) or that the size of the ad is very important (25%) in attracting their attention.

There were few features that were called "not at all important" by more than a handful of engineers. However, at least one-fourth of the engineers described the following as not at all important in attracting their attention to an ad: the ad's position on the page (40%); descriptions such as "stimulating," "dynamic" "future-oriented," "career opportunity" (26%); and graphics, photos, or drawings (25%).

After noticing and reading an employment ad, engineers may or may not respond. Blind ads (i.e., those that do not identify the advertiser or employer) are uniformly unlikely to produce a response. Almost 8 in 10 of the engineers say that they are "not very" or "not at all likely" to respond to a blind ad, all other things being equal; only 2 in 10 say they are "very" or "somewhat likely" to respond (mostly the latter). Focusing on two of the concerns that might discourage the engineer from responding to a blind ad, we asked those in the "not likely" groups about blind ads that (1) guarantee a response, and (2) guarantee not to forward the applicants' resumes to companies they rule out. While modifying the blind ad in either of these two ways will improve the response rate according to the engineers, opposition to the blind ad remains very powerful. On the positive side, the projected rate of response to a blind ad roughly doubles when either of the two modifications is instituted (from 21% to 40% for the guaranteed response condition and to 43% for the controlled distribution condition). On the negative side, about three-fourths who initially say they are unlikely to respond to a blind ad continue to say that the modification is unlikely to change their response, leaving about 60% of the engineers overall who are not likely to respond to a blind ad, no matter what. This negative sentiment applies regardless of prospect group or willingness to consider relocation. (See Table 23.)

Employment ads may call for a variety of steps for contacting the employer and initiating the application process. We asked about nine possible instructions, five of which described the action to be taken and four of which indicated the person or entity to be contacted. Of possible steps to be taken, making a telephone call and sending in a resume were roughly tied, with 58% and 55% indicating that they would be very likely to respond to such an instruction. Far less popular steps were attending an open house (13%), mailing in an application coupon (8%), and calling a job hotline (8%). As for the person or entity to be contacted, engineers prefer people with direct responsibility: 60% said that they would be very likely to respond to an instruction to contact the department head, compared with 46% for the person in charge of hiring, 38% for a specific person in the personnel department, and only 21% for the personnel department in general. Prospect status and willingness to relocate did not affect these preferences. (See Table 24.)

Table 22

Importance of Ad Features in Attracting Engineers' Attention to Newspaper Employment Ads

Feature	Importance of Feature: Very Important	Somewhat/ Not very Important	Not at all Important
BASE: 157			
Job description	62%	35%	3%
The job title	59	38	3
Required qualifications and experience	54	43	3
Job location	44	52	3
The company name and/or logo	34	61	5
Salary	26	66	8
The size of the ad	25	66	9
Headline of ad	18	78	5
Statement of company philosophy ("where the company is going," technological vision of the future)	18	73	9
Equipment/hardware/software technology	13	73	14
Descriptions such as "stimulating," "dynamic," "future-oriented," "career opportunity"	9	65	26
Graphics/photos/drawings	4	72	25
The ad's position on the page	4	56	40

Question: How important are the features listed below in attracting your attention to a newspaper employment ad? (Very, somewhat, not very, and not at all important)

Table 23

Engineers' Likelihood of Responding to a Blind Ad Under Various Conditions

Likelihood of Responding (BASE: 157)			
Very Likely	Somewhat Likely	Not very Likely	Not at all Likely
3%	18%	50%	29%

Likelihood of Responding to a Blind Ad that Guarantees a Response			
Very Likely	Somewhat Likely	Not Very Likely	Not At All Likely
2%	22%	46%	30%

Likelihood of Responding to a Blind Ad that Guarantees Resume Will Not Be Sent to Specific Companies			
Very Likely	Somewhat Likely	Not Very Likely	Not At All Likely
6%	23%	40%	31%

Questions: All other things being equal, how likely would you be to respond to a "blind" ad; that is, an employment ad that does not indicate who the advertiser or employer is?

FOR THOSE ANSWERING "NOT VERY LIKELY" OR "NOT AT ALL LIKELY": All other things being equal, how likely would you be to respond to a "blind" ad that (a) guarantees a response? (b) guarantees that your resume will not be sent to those companies that you specifically rule out?

Table 24

Engineers' Likelihood of Responding to Instructions in Employment Ads

Instruction	Very Likely	Somewhat/ Not Too Likely	Not at all Likely
	Likelihood of Response		
BASE: 157			
Contact department head	60%	39%	1%
Make a telephone call	58	40	2
Send in a resume	55	43	3
Contact person in charge of hiring	46	53	2
Contact specific person in personnel department	38	57	5
Contact personnel department	21	72	7
Attend an open house	13	73	14
Mail in an application coupon	8	71	21
Call a job hotline	8	61	31

Question: As you know, employment ads contain different instructions as to how to contact the employer. If you were looking for employment, with all other things being equal, how likely would you be to respond to an ad asking you to do the following . . . ?

II. CONCLUSIONS

Most engineers seem relatively satisfied with their current employment, and many are prepared to stay put for at least the immediate future. There is a small group that is likely to change jobs soon, as well as an "iffy" group that might or might not change jobs, depending on whether the "right opportunity" comes along. A minority of engineers would rule out the possibility of relocating for a new job.

Engineers who are Hot Prospects tend to be at an earlier stage of their careers and are more likely to be seeking career advancement through a new job than those who would stay put. Like other differences noted in this report, however, this is only an average difference between the prospect groups, which in fact overlap considerably in their composition and include individuals at all stages of their careers. Engineers interested in changing jobs, as well as those willing to consider relocation, tend to be most concerned about "intrinsic" features of a new job -- particularly the opportunity to do challenging work -- and somewhat less concerned about such "extrinsic" factors as fringe benefits. This does not mean, however, that engineers consider fringe benefits to be unimportant but only that benefits are not the driving force behind a job decision; probably a minimal level of benefits is assumed. A competitive salary, while not at the top of the list of concerns, is important, although a somewhat lower than competitive salary does not necessarily rule out consideration of an employment opportunity for most.

How does a prospective employer attract these professionals? One issue involves relocation: employers who wish to widen their search to attract engineers outside of their immediate area should consider what the engineers have told us about relocation. Even though only a minority absolutely rule out relocation, most engineers voice a number of concerns about relocating. This study confirmed the findings of the earlier qualitative work that there is great concern about balancing the overall economic equation in making a move. The cost of living in the new location, and the cost of housing in particular, are of great concern, coupled with concerns about high interest rates and selling the present home. At minimum, a large majority would expect some help with moving expenses if they were to accept a job in another part of country.

Prospective employers need to be aware of these concerns and take steps to address them. Some employers may have to "sweeten the deal" to attract engineers to high-cost locations; others may simply need to educate prospects about the moderate cost of living their areas offer, and still others may be able to use their low cost of living as an incentive in recruiting engineers from higher-cost areas.

As might be expected, engineers are uniformly concerned about the opinion of their spouses in considering a job involving relocation. Since this appears to be different from a concern about the spouse's employment (which was not frequently voiced), what prospective employers can do about it is not readily apparent. Like the engineer's own opinion, the opinion of the spouse undoubtedly encompasses multiple concerns about relocating, some fairly common to the group and others unique to each household. One could hazard a guess, however, that addressing concerns about the cost of living and housing would help in obtaining a spouse's support for relocation, since most no doubt want to maintain or improve their current standard of living. Prospective employers should also make sure that applicants from out of town are aware of any of the advantages of their area that at least some of the engineers have indicated are important. For instance, an employer in a community well known for the quality of its schools should cite this fact at some point in the recruitment process.

Putting aside the relocation issue, ads targeted at engineers should be high in substantive information about the job and employer. Engineers interested in changing jobs are looking for challenge in their work, and the ad must speak to them in a way that leads them to believe that the advertised position offers this opportunity. They want to see the job title, a description of the job, and the name and location of the employer. Most will not respond to blind ads of any kind. Many want to know what qualifications are required for the position and the salary; whether or not these are made explicit, the ad should contain enough information for readers to decide whether the level and scope of the job are consistent with their backgrounds and expectations. In addition, engineers feel that their response to an ad warrants attention by someone with technical knowledge of the position and some role in determining who will be hired, e.g., the head of the department where the job is located or the person(s) who are to make the selection. Advertisers should therefore take care not only to identify the employer and describe the job, but whenever possible should also direct responses to the engineering professional responsible for filling the position.

Engineers typically prefer word of mouth and personal contacts to almost all other sources of employment information. However, activating their professional networks, reviewing classified ads in newspapers, looking at ads in journals, and contacting a placement service are not mutually exclusive activities, and engineers do in fact use the newspaper as an important source of employment information (whether or not they are looking for a job). Readership of the newspaper, particularly the Sunday paper, is high among engineers, and most of those interested in changing jobs review the ads at least every couple of weeks. Even many of those with no interest in changing jobs read the ads at least once a month.

To increase the likelihood that an ad will reach its intended audience, employers should consider running employment ads on at least two consecutive Sundays. Not all of those interested in changing jobs read the employment ads every week, and so a strong prospect may miss an ad if it appears only once. Finally, as newspaper employment ads become more responsive to the needs of engineers, presenting the substantive information they require and calling for a response they consider appropriate, the newspaper will become even more important as a source of employment information for the engineering profession.

7/18/88 A 8600-8.51-U

KEY FACTS 1988

Newspapers, Consumers, Advertising

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921-5080

KEY FACTS 1988:

NEWSPAPERS, CONSUMERS, ADVERTISING

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

May 1988

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How To Use Key Facts

The main purpose of this report compiled from many sources is to answer some of the most frequently asked questions about newspapers, consumers, and advertising.

The report is designed as a reference source, not as an account to be read through page by page. To maximize its reference value, the table of contents organizes specific items of information under general headings such as "Advertising Costs" and "Newspaper Circulation".

For example, information on daily newspaper reach and frequency comes under the general heading of "Newspaper Readership", where it is listed as "Reach, Frequency and Gross Rating Points: Typical Five-Day Patterns for Daily Newspapers at Varying Levels of Penetration".

The scope of the material is necessarily limited. For answers to other questions about newspapers and advertising, consult the heading "NAB Telephone Directory".

CONTENTS

Page

Ad Readership

Creativity in newspaper advertising.............................. 30
Estimating ad readership.. 31
How editorial environment affects ad readership................... 32
Position of ad on page, index of readership....................... 32
Multiple insertions: how advertising exposure accumulates........ 33
Newspaper items and advertising, kinds usually read............... 20
Page opening--reader traffic...................................... 25

Advertising Costs

Color premium (percent above black-and-white cost)................ 35
Cost-per-household gross rating point:
daily newspaper vs. tv (top 20 ADIs).......................... 16
Discounts for continuity (NEWSPLAN).............................. 5
Intermedia cost estimates...15,16
Typical national insert CPMs for Sunday newspapers................ 34
Where to obtain rate information.................................. 13

Advertising (Miscellaneous)

Advertising-to-sales ratios for
selected retail stores and services........................... 44
Believability of advertising in five media........................ 42
Co-op advertising: Newspaper Co-op Network (NCN).................. 14
How newspaper advertising works................................... 18
Newspapers and Television: Index of heavy users................... 21
Standard Advertising Units (SAU^{TM})......................... 10,11,12

Advertising Sales Effects

Advertising influence on last unplanned purchase.................. 40
How newspaper advertising affects package goods sales............. 39
Percent of this week's purchases not planned last week............ 40
ROP color, sales effects of....................................... 42

Advertising Volume

Coupon distribution patterns...................................... 37
National, retail and classified dollars in newspapers............. 34
Newspaper insert advertising volume............................... 34
Total advertising volume in the United States..................... 36

CONTENTS (continued)

Page

Color Advertising

Color premium (percent above black-and-white cost)................ 35
ROP color availability in 317 MSAs................................ 35
ROP color reproduction.. 4
Sales effects of ROP color.. 42

Consumers and the Newspaper

Consumers in the classified marketplace........................... 43
Day of week for main general merchandise shopping................. 41
Food shopping... 38
Retail shopping, unplanned purchases.............................. 40

Coupons

Distribution and usage.. 37

Definitions

A few common newspaper terms...................................... 17

Newspaper Advertising and Editorial Content

Creativity in newspaper advertising............................... 30
Editorial environment: newspaper features and sections........... 19
Free-standing insert options...................................... 9
Future of (newspaper) advertising................................. 3
How editorial environment affects ad readership................... 32
How newspaper advertising works................................... 18

Newspaper Advertising Bureau Services

CAN DO--audience data for daily and Sunday newspapers............. 8
Economic and Media Analysis Unit reports.......................... 7
NAB telephone directory... 1,2
Newspaper Co-op Network (NCN)..................................... 14
NEWSPLAN (discounts for continuity)............................... 5
New technology.. 4
One-order/one-bill service.. 9
Rate information, where to obtain 13
Reach and frequency of newspaper schedules (CAN DO)............... 8
Research information on consumers and readers..................... 6
ROP color reproduction.. 4

CONTENTS (concluded)

Page

Newspaper Audience and Readership Data

Daily newspaper Gross Rating Points, by demographics.............. 22
Day of week, index of readership by............................... 29
How daily newspapers read yesterday were obtained................. 29
Newspaper items and advertising, kinds usually read............... 20
Newspapers and television: index of heavy users................... 21
Number of times daily newspaper read or looked at................. 24
Page opening--reader traffic...................................... 25
Professionals and managers, average weekday coverage.............. 28
Reach, frequency and Gross Rating Points for daily newspapers at varying levels of penetration.............. 26
Readers-per-copy estimates for total United States................ 28
Readers-per-copy in top 50 ADIs................................... 28
Sunday/weekend newspaper Gross Rating Points, by demographics..... 23
Time spent reading daily newspaper................................ 24

Newspaper Circulation

Canada, newspaper circulation data for............................ 27
How much do people spend to read newspapers?...................... 27
Month-by-month index of circulation, for morning, evening and Sunday editions...................... 29
Subscriptions, single-copy sales, pass-along...................... 29
United States, number and circulation of daily and Sunday newspapers, 1985 - 1987.................... 27

Telephone Directory - Newspaper Advertising Bureau

New York Office	(212) 921-5080
Chicago Office	(312) 644-1290
Dallas office	(214) 239-4380
Detroit Office	(313) 642-9200
Georgia Office	(404) 949-4833
Los Angeles Office	(213) 480-0452
San Francisco Office	(415) 981-8118

Ad readership	Stu Tolley	704-4562
Advertising expenditures	Yannis Takos	704-4561
Advertising rates	Yannis Takos	704-4561
Automotive classified	Hugh Quinn	(313) 642-9200
Automotive sales	Bill Tausch	(313) 642-9200
CAN DO (local audience data)	Susan Lorenzana	704-4555
Classified, Outside Sales	Bob Scaife	(313) 642-9200
Color (ROP)	Charles Kinsolving	704-4544
Competitive media	Tom Fitzpatrick	704-4551
Co-op sales (NCN)	Frank Hennessey	(312) 644-1290
Coupon information	Carolyn Eldred	704-4615
Demographic trends	Hank Khost	704-4552
Desktop publishing	Jim Conaghan	704-4558
Food retailers & manfacturers	Bob Gaines	704-4540
Information center	Ann Brady, Susan Hyer	704-4549
Inserts, preprints	Jack Aldinger, Ted Knecht	704-4520/1
Intermedia cost estimates	Uldis Grava	704-4550
Marketing services	Uldis Grava	704-4550
Mass merchandising	Jim Hollis	704-4533

(Unless otherwise stated, area code is 212.)

(continued)

Telephone Directory - Newspaper Advertising Bureau

Member orders: Promotion	Susan Harelick	704-4614
Member orders: Research	Audrey Townsend	704-4565
Membership services	Bill Solch	704-4530
National sales	Jim Wilson	704-4503
Newspaper circulation	Yannis Takos	704-4561
Newspaper features/sections	Dorothy Shea	704-4557
Newspaper readership	Chuck Lehman	704-4564
NEWSPLAN	Jim Wilson	704-4503
New technology	Peter Winter	704-4613
Non-subscriber products	Cathie Ullett	704-4610
One Order/One Bill	Jack Aldinger, Ted Knecht	704-4520/1
Public and media relations	Jim Dunaway	704-4547
Real Estate classified	Tony Marsella	704-4516
Recruitment advertising	Ira Gordon	704-4515
Retail Yellow Pages Workshop	Bob Scaife	(313) 642-9200
Retailing	Alfred Eisenpreis	704-4535
SAU™(Standard Adv. Units)	Charles Kinsolving	704-4544
Syndicated readership data	Chuck Lehman	704-4564
Telemarketing	Kitty Vance	704-4513
Total market coverage	Jack Aldinger	704-4521
Workshop/seminar information	Steve Van Osten	704-4527

(Unless otherwise stated, area code is 212.)

The Future of (Newspaper) Advertising

The Board of Directors of Newspaper Advertising Bureau initiated the Future of Advertising Project in order to better serve advertisers and their agencies. Under the direction of Harold W. Andersen, Chairman of the Steering Committee, ten task forces have examined problems and opportunities, commissioned research, prepared publications and offered suggestions.

Among the important recommendations growing out of the FOA Project are these:

- adoption of a Standard Advertising Invoice
- adoption of standard breakpoints for volume discounts for national advertisers
- greater flexibility in positioning; consideration of an island position on first or second pages of stock exchange listings
- shorter lead times for camera-ready color ads
- the elimination of minimum size requirements for color ads
- use of the Standard Advertiser Codes
- use of Guidelines for Standardized Retail Research in local consumer surveys
- adoption of a standard format for presenting market data in promotion brochures
- standard procedures for remote entry of classified advertising

NAB Services: New Technology

The oldest advertising medium in the United States is one of the most advanced in technological applications. Newspapers have launched a variety of electronic information services. Computerization and satellites have transformed every aspect of newspaper production. And electronic pressroom equipment is revolutionizing run-of-paper (ROP) color reproduction.

The New Technology department works closely with advertisers, agencies and newspapers to develop programs to make newspapers a more attractive, more economical, and easier-to-buy medium. The department is now focusing on improving ROP color reproduction and the standardization of newspaper special sections (e.g., TV logs).

The department also works closely with the Technical Committee of ANPA, the 4As and other organizations to track key developments in the new technologies, and their implications for the newspaper business.

Particular areas of interest of the department include:

Standardization
ROP Color
Satellite Transmission (AD/SAT)
Electronic Information Services
Remote Entry
Public Access Videotex
Personal Computer Market
Cable TV
Electronic Newspaper Libraries

For more information on New Technology department activities, call Thelma Anderson at (212) 704-4543.

NEWSPLAN: Discounts for Continuity

ONE PROGRAM:

NEWSPLAN's purpose is to make national and regional advertising more effective by giving it the believability, immediacy and selling impact of ROP newspaper advertising at lower cost and greater convenience.

THREE BENEFITS:

Discounts - lower cost for the advertiser

By planning ahead, you can earn discounts from 10% to 30% or more with NEWSPLAN. Plan your advertising on an annual basis to make sure your cumulative space--in column inches or modular units--equals 6 pages, 13 pages or 52 pages. Discounts at these page levels are in effect in over 1,000 newspapers representing 82% of total U.S. circulation.

SAUs™ - simplified specs for the creative department

Thanks to Standard Advertising Units accepted by nearly 1,600 daily newspapers (98% of total circulation) one finished mechnical now covers all the newspapers in your schedule in most cases. (See pages 10, 11 and 12 for more details.)

CAN DO - better audience data for marketers and planners

CAN DO gives you net reach and frequency data for any daily or Sunday newspaper schedule and any geographic area, down to the county level. Audience figures can be run by sex, age, household income or household size. CAN DO computer runs are available through your own terminal if you are an IMS subscriber, or through NAB at cost.

For more information on NEWSPLAN, call Jim Wilson at (212) 704-4503.

Research Information on Consumers and Readers

Newspaper Advertising Bureau supports an active research program. The Research Department uses a variety of custom surveys, syndicated research and secondary sources to meet the needs of advertisers, advertising agencies and member newspapers. As of January 1988, the Research Department's list of in-print publications numbers 119 reports, brochures and research notes.

The subject areas covered include:

newspaper readership and audience data,
ad readership,
classified advertising,
competitive media,
retail shopping,
sales effects of advertising.

Reports can be obtained through member newspapers. A current list of in-print research publications is available on request. For more information, call Audrey Townsend at (212) 704-4565.

ANNUAL REPORTS PREPARED BY ECONOMIC AND MEDIA ANALYSIS UNIT, NEWSPAPER ADVERTISING BUREAU

1. U.S. Daily and Sunday newspapers - 1945 to present - Number and Circulation
2. How much do people spend to read daily and Sunday Newspapers? 1945 to present

3. Total advertising volume in the U.S., 1935-1985 (McCann-Erickson)
4. Newspaper advertising expenditures, 1945-1985. National, Retail and Classified

5. National advertising expenditures in measured media by classification
6. Annual retail newspaper advertising expenditures by category

7. Classified newspaper advertising expenditures by type, 1975 to present.
8. Daily newspapers in 317 MSAs: Households, coverage, circulation, column inch rate, cost of SAU quarter page, SAU half page and full page

9. Sunday newspapers in 317 MSAs: Households, coverage, etc.
10. Daily newspapers in 212 ADIs: Households, coverage, etc.

11. Sunday newspapers in 212 ADIs: Households, coverage, etc.
12. Daily newspapers in 317 MSAs: ROP color edition

13. Daily newspapers in 212 ADIs: ROP color edition
14. Cumulative circulation and rates of daily newspapers in 317 MSAs necessary to obtain 60% household coverage in each market

15. Cumulative circulation and rates of Sunday newspapers in 317 MSAs necessary to obtain 60% household coverage in each market
16. Cumulative circulation and rates of daily newspapers in 212 ADIs necessary to obtain 60% household coverage in each market

17. Cumulative circulation and rates of Sunday newspapers in 212 ADIs necessary to obtain 60% household coverage in each market
18. Daily and Sunday newspapers with zone editions

19. Cities in the U.S. with two or more newspapers
20. Newspapers in the U.S. not accepting beer, wine or liquor advertising

21. Media breakdown of U.S. agencies billing $30 million or more
22. Newspapers not offering a 2% cash discount

Inquiries: Research Department, (212) 704-4611, -4612

CAN DO: Audience Data for Daily and Sunday Newspapers

The Newspaper Advertising Bureau's CAN DO program can:

- produce detailed audience data for any list of daily and Sunday newspapers
- provide data customized to any geographic or selected demographic definition
- calculate reach, frequency, and frequency distribution estimates
- allow media mix analyses through IMS data base for other media
- deliver data output via an on-line computer system

CAN DO uses county building blocks to estimate audiences for all MSAs, ADIs, DMAs or customized areas contructed on whole county lines. And CAN DO provides estimates for the most important audience breaks--age, sex income, and household size.

If you wish to provide us with the total cost per insertion, CAN DO will give you specific cost-per-thousand information on your newspaper audience.

For further information, contact Susan Lorenzana at (212) 704-4555.

NAB's One-Order/One-Bill Newspaper Placement Service

This service is set up to provide advertisers and agencies with all the information needed to plan and execute any type of multi-newspaper ROP or insert program, including costs, specifications and availabilities. For estimates and information, call Jack Aldinger or Ted Knecht at (212) 704-4520/21. They will handle all paper work, make reservations, issue insertion orders, provide proof-of-performance tearsheets and forward payment to every newspaper on the schedule, billing you on one invoice.

Free-Standing Insert Options

Today inserts can be distributed in nearly every daily and Sunday newspaper in the United States. Circulation achieved is more than 57 million daily and 59 million Sunday. Over 50% of all Sunday editions can distribute an insert in less than their full-run circulation, and more than 75% will accept a product sample attached to an insert. A similar proportion will accept an envelope, either empty or containing inserts or coupons.

Sizes are almost limitless. You can make an insert as large as anything that fits into the newspaper when folded, to 11" x 13", or as small as 5" x 7". Formats are equally varied: from a single page to a booklet of 96 pages or more. Inserts can be long or short and can include flaps, gatefolds, reply cards, coupons, perforations, fragrances, etc. Inserts can be printed on all types of paper, from ordinary newsprint to super-coated card stock.

Standard Advertising Units (SAUs)™

The Standard Advertising Unit system simplifies the production and placement of newspaper advertising. The expanded SAU™ system introduced on July 1, 1984 received the endorsement of AAAA, ANPA, INAME, NAB and other organizations. Practically every daily newspaper in the U.S. accepts SAUs.

Broadsheet newspapers in full compliance with the system have a 6-column format for display advertising, a 13-inch printed page and a standard column width of 2 1/16 inches. Measurement and billing of advertising is based on the standard column inch.

Most tabloids have adopted a 5-column format with the same column width as broadsheets. There are special provisions for short cut-off tabloids. (The expanded SAU™ format chart on page 11 depicts 53 of the 57 advertising sizes developed, including the N size for short cut-off tabloids. The remaining four sizes are all double trucks, as noted.)

For more information or a full-scale SAU™ format chart, call Charles Kinsolving at (212) 704-4544.

The Expanded SAU™ Standard Advertising Unit System

13"

Depth in Inches	1 COL. 2-1/16"	2 COL. 4-1/4"	3 COL. 6-7/16"	4 COL. 8-5/8"		5 COL. 10-13/16"	6 COL. 13"
FD*	1xFD*	2xFD*	3xFD*	4xFD*		5xFD*	6xFD*
18"	1x18	2x18	3x18	4x18		5x18	6x18
15.75"	1x15.75	2x15.75	3x15.75	4x15.75		5x15.75	
14"	1x14	2x14	3x14	4x14	N	5x14	6x14
13"	1x13	2x13	3x13	4x13		5x13	
10.5"	1x10.5	2x10.5	3x10.5	4x10.5		5x10.5	6x10.5
7"	1x7	2x7	3x7	4x7		5x7	6x7
5.25"	1x5.25	2x5.25	3x5.25	4x5.25			
3.5"	1x3.5	2x3.5					
3"	1x3	2x3					
2"	1x2	2x2					
1.5"	1x1.5						
1"	1x1						

1 Column 2-1/16"
2 Columns 4¼"
3 Columns 6-7/16"

4 Columns 8⅝"
5 Columns 10-13/16"
6 Columns 13"

Double Truck 26¾"
There are four suggested double truck sizes:

13xFD* 13x18
13x14 13x10.5

Fractional Pages: Column Inch Equivalents, With Standard Advertising Unit Options

Broadsheet

Full page = 126 column inches

6 x 21 (full depth)

Two-thirds page = 84 column inches

4 x 21 (full depth)
6 x 14

Half page = 63 column inches

3 x 21 (full depth)
4 x 15.75
6 x 10.5

One-third page = 42 column inches

2 x 21 (full depth)
3 x 14
4 x 10.5
6 x 7

Quarter page = 31.5 inches

2 x 15.75
3 x 10.5

One-sixth page = 21 column inches

1 x 21 (full depth)
2 x 10.5
3 x 7
4 x 5.25

Tabloid*

Full page = 70 column inches

5 x 14

Four-fifths page = 56 column inches

4 x 14

Three-fifths page = 42 column inches

3 x 14
4 x 10.5

Half page = 35 column inches

5 x 7

Two-fifths page = 28 column inches

2 x 14
4 x 7

One-fifth page = 14 column inches

1 x 14
2 X 7

One-tenth page = 7 column inches

1 x 7
2 x 3.5

* May not apply to the New York Daily News, Newsday and other short cut-off tabloids. Consult individual newspaper for equivalents.

Where to Obtain Rate Information

Through NAB's NEWSPLAN, over 1,000 newspapers with more than 82% of total weekday circulation offer discounts to national and regional advertisers who place ROP column inches or modular units equal to six or more pages per year. For more information, contact Jim Wilson at (212) 704-4503.

Current information on ROP rates for daily and Sunday/weekend newspapers is available from the Economic and Media Analysis Unit of NAB. Contact Yannis Takos at (212) 704-4561.

Among the Economic and Media Analysis Unit reports that include rate information are the following:

MSA METROPOLITAN MARKETS BY HOUSEHOLDS (317 MSAs)

United States markets ranked by number of households in MSA. Lists all newspapers with at least .05 ratio of circulation to households or more than 25,000 circulation. Includes circulation-to-household ratios; metro and total circulation; inch rates; and cost of SAU quarter page, half page and full page. Published separately for weekday and Sunday/weekend editions.

ADI MARKETS BY HOUSEHOLDS (212 ADIs)

Comparable information, ranked by number of households in Area of Dominant Influence rather than by Metropolitan Statistical Area.

CUMULATIVE CIRCULATION AND RATES OF DAILY NEWSPAPERS IN 317 MSAs NECESSARY TO OBTAIN 60% HOUSEHOLD COVERAGE IN EACH MARKET

(For complete list of annual reports prepared by Economic and Media Analysis Unit of NAB, see page 5.)

Current information on rates for preprints and inserts is available from Jack Aldinger at (212) 704-4521 or Ted Knecht at 704-4520.

Newspaper Co-op Network (NCN)

With just one call to Newspaper Co-op Network, manufacturers and advertising agecies can easily place dealer listing co-op ads in any number of markets. Through NCN, you can coordinate your local message with your national brand awareness advertising--and still include local dealer listings in each market.

NCN DOES ALL THE WORK! Here are ten of NCN's unique advantages:

FACT 1 One Order/One Bill makes newspapers easy to use for co-op and eliminates the hassle of multiple orders and invoices.

FACT 2 NCN is cost efficient--It eliminates administration costs and insures the best possible rates available for dealer list co-op advertising.

FACT 3 Stimulates local retailer involvement and produces new retail single-signature advertising.

FACT 4 Flexibility--Tailors newspaper coverage to your needs for any combination of regular or test markets.

FACT 5 Creative control--Advertiser controls both graphics and content.

FACT 6 Guaranteed-timing--Direct placement when and where you want it.

FACT 7 Localized monitoring--Provides a new measurement tool. National Sales Manager now evaluates local market dealer penetration.

FACT 8 Customization--Dovetails ad coverage with local representatives' sales areas or distributor/wholesaler territories.

FACT 9 Specialization--Trouble-shooting capability to solve immediate marketing problems, market by market.

FACT 10 Free sales help!--NCN's newspaper co-op managers act as an extension of your own sales force. (Newspapers have more than 26,000 retail sales people in the field.)

Best of all, NCN WORKS! Ask us for success stories. For more information on NCN, call Frank Hennessey at (312) 644-1295.

Estimating Intermedia Advertising Costs

Media planners often need to compare the cost of various advertising media. One approach to the problem is to use common universe standards as a media base. The Area of Dominant Influence (ADI) is a geographic unit often used for planning purposes, since the 212 ADIs account for the total land area of the United States.*

Intermedia cost estimates can be expressed in terms of households or standard demographic age/sex cells because current figures are available for both broadcast and newspapers. Since major advertisers and agencies are usually concerned with advertising schedules rather than single insertions, the logical measure for potential exposure is Gross Rating Points (GRPs).

The table on page 14 illustrates how GRPs can be used for intermedia comparisons, in this case between TV and newspapers. This table compares the cost-per-household GRP of the quarter-page newspaper space unit (31.5 column inches) with the 30-second commercial unit. The TV daypart used is prime because this is the time period offering a large dual audience, most comparable in size and composition to newspapers.

The figures shown represent a conservative estimate at national open rates, used in the initial stage of setting up a media plan. A final plan specifying particular TV programs and newspapers (with local or earned volume discounts) would show better efficiencies in cost-per-thousand audience delivery.

For further details contact Uldis Grava at (212) 704-4550.

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* This statement applies to the Designated Market Area (DMA) as well. ADI is used by Arbitron; DMA, by Nielsen.

For most marketing purposes, the Metropolitan Statistical Area (MSA) definition of markets is the most appropriate measure, because boundaries are drawn to take into consideration where people live, work and shop. However, the advertising community's standard practice is to use television-oriented market definitions, such as ADIs and DMAs.

Newspaper vs. Television: Top 20 ADI Markets
HH Universe and Cost/HH GRP Comparison

ADI Market	HH (000s)	30 second Primetime Spot TV Cost/HH GRP	31.5 inches Daily Newspapers Cost/HH GRP
1. New York	6,924	$659	$722
2. Los Angeles	4,757	$718	$495
3. Chicago	3,110	$320	$348
4. Philadelphia	2,655	$292	$309
5. San Francisco	2,144	$339	$283
6. Boston	2,060	$356	$245
7. Detroit	1,704	$182	$233
8. Dallas/Ft. Worth	1,618	$220	$195
9. Washington, DC	1,581	$218	$210
10. Houston	1,445	$230	$143
Total: Top 10	27,998	$3,534	$3,183
11. Cleveland	1,428	$117	$135
12. Atlanta	1,256	$184	$143
13. Minneapolis/St. Paul	1,236	$150	$152
14. Tampa/St. Petersburg	1,215	$135	$125
15. Seattle/Tacoma	1,244	$184	$124
16. Miami	1,200	$234	$190
17. Pittsburgh	1,207	$131	$157
18. St. Louis	1,092	$106	$114
19. Denver	1,025	$124	$ 97
20. Sacramento	997	$117	$121
Total: Top 20	39,898	$5,016	$4,541

Sources: Media Market Guide, 1st Qtr 1988; PEP Media Database, 1988

A Few Common Newspaper Terms

AD/SAT^{TM}	The Satellite Network for Advertising Delivery provides high-resolution facsimile transmission newspaper advertising, by satellite, in minutes.
Broadsheet:	A "standard" or large-size newspaper. In July 1984, most broadsheet dailies adopted a uniform, 13-inch printed page width and a full depth of 21" or deeper, up to 22 1/2".
City zone:	The corporate city limit, plus adjoining areas in cases of heavily populated areas, as designated by the Audit Bureau of Circulation (ABC).
Color scanner:	Electronic equipment that automatically produces separations for ROP process (or "full") color.
Column inch:	Space measurement one column wide and one inch deep. (See "SAUs", pp 10,11,12.)
Double truck:	Two facing pages used for a single unbroken advertisement. Also called a two-page spread.
Facsimile transmission:	The electronic transmission of a page image (usually to printing plants at other sites).
Front-end system:	A total computer system for text entry, editing, formatting and/or billing, for editorial, display advertising and/or classified advertising.
Pagination system:	A computerized makeup system for composing whole pages of type, line art and halftones.
Penetration:	For a given newspaper within a specified area, the ratio of circulation to households; the newspaper equivalent of a household rating in broadcast.
ROP ("run-of-paper"):	ROP is a term generally applied to ads that appear on a newspaper page (as distinguished from inserts or preprints).
Scotch double truck:	A single unbroken advertisement on two facing pages bordered by one full column of editorial on each of its vertical sides and by shallow columns of editorial across the top.
Tabloid:	A newspaper with a smaller page size than a broadsheet. A full tabloid page is usually 14 inches deep. The width varies from 9 3/8" ("short cut-off") to 10 13/16" ("long cut-off").

How Newspaper Advertising Works

The daily newspaper is a unique advertising medium that readers value as a useful source for many kinds of information. The most common way of reading the paper is to start with the front page and go through the issue page by page, scanning it for articles and ads that look "interesting". Readers know the difference between editorial content and advertising, but in practice they don't pay much attention to this distinction.

The human eye's efficiency as a scanning device makes it easy for readers to find the articles and ads they want to read. As a result, interest in newspaper ads is highly correlated with buying interest:

Average Interest Level in Newspaper Ads
(by Prospect Status)

Prospects:	Interest in Ad
I ("hottest" prospects)	87%
II	75
III	47
Non-prospects:	
IV	48%
V	37
VI ("coldest" non-prospects)	14

Source: Newspaper Advertising Bureau collation of surveys by individual newspapers, 1985-1986.

This close link between prospect status and interest in advertising may seem self-evident, but it does not necessarily hold for other media in which advertisers depend on novelty, humor or celebrity presenters to attract the consumer's attention.

Editorial Environment: Newspaper Sections and Features

The daily and Sunday newspaper provide varied editorial environments to meet the needs of almost any advertiser.

A 1987 survey of newspapers enables NAB to supply a computerized list of newspapers that regularly carry a specific section or feature. This list, alphabetized by state and by city within state, tells which days of the week the section or feature runs, as well as the newspaper's policy on positioning advertising in that section or adjacent to that feature.

SECTIONS on which information is available include:

- Business, Finance
- Entertainment
- Fashion
- Food
- Home
- Lifestyle, Women
- Science
- Sports
- TV, Radio
- Travel

FEATURES (partial listing):

- Advice on personal finance
- Astrology
- Automotive
- Beauty

- Best food buys
- Books
- Business, financial
- Career advice

- College
- Computers (personal)
- Diet, nutrition
- Fashion, men

- Fashion, women
- Fashion, teenage
- Games and puzzles
- Gardening

- Health and medical
- Home repair, building
- Home furnishings
- Movie timetable

- Music, records, tapes
- Op Ed page
- Outdoors: camping, etc.
- Personal advice

- Pets
- Physical fitness
- Real estate
- Recipes

- Religion
- Restaurants
- Science
- Stamps, coins

- Theater
- Travel & resort
- Videotape reviews
- Wine

For information, call Chuck Lehman at (212) 704-4564.

Kinds of Newspaper Items and Advertising "Usually Read"
(by sex)

Editorial	Total Adults	Men	Women
News about local community	84%	84%	83%
International or world news	75	79	71
News briefs, summary of news	74	77	72
News about President, Congress	72	79	66
News about local politics, gov't.	69	74	65
News about economy, jobs, inflation	68	73	62
News about celebrities	65	56	74
TV program listings	60	58	62
Advice columns	59	43	73
Comic strips, "funnies"	58	60	56
Calendar of local events	57	52	61
Editorials, editor's opinions	55	53	58
Letters to the editor	55	51	58
Food pages	54	35	72
Investigative, in-depth articles	53	52	54
Sports news: local schools	53	63	43
Public opinion polls	52	54	50
Sports news: professional teams	51	72	32
Obituaries	50	43	57
Movie reviews	48	44	52
Fashion and lifestyle features	47	26	67
Business and financial news	46	57	36
Political opinion columns	45	48	41
Book reviews	27	21	32
Crossword puzzles	26	22	29
Advertising			
Supermarket ads	58%	40%	73%
Store ads for clothing	57	40	73
Movie ads	50	47	53
Help wanted classified	43	42	44
Real estate classified	31	34	28
Base: Total newspaper readers = 100%	(1,702)	(698)	(1,004)

Source: Response Analysis Corporation, 1987

Question: Each of these cards contains a different kind of news, feature or advertising item appearing in most daily newspapers. Please look through them and put to one side the kinds of things you don't usually read or look at.

The best newspaper readers are the best customers for most products and services, and the newspaper is the perfect complement for any TV schedule.

Heavy Users of Newspapers and Television

	Top Quintile:	
Demographic Segment	Newspaper Index*	Television Index*
Household income $60,000 or more	172	54
Indiv. employment income $35,000 or more	162	54
College graduate	157	59
Manager, administrator	155	63
Own home valued at $100,000 or more	155	69
Household income $50,000-$59,999	145	67
Northeast Census region	142	75
Indiv. employment income $30,000-$39,999	138	63
Professional	134	49
Age 45-54 years	133	86
One-three years college	131	86
Household income $40,000-$49,999	123	78
Own home valued at $60,000-$99,999	121	97
Technical, clerical, sales occupation	118	60
Age 35-44 years	115	78
Household income $35,000-$39,999	109	92
Suburban resident	109	98
Household income $30,000 - $34,999	103	89

Source: Mediamark Research Inc., Spring 1987

* Proportion of total adults in top quintile (20%) = 100.

Daily Newspaper Gross Rating Points (GRPs)
(One, five and thirteen weekdays)

	One Weekday	Two Weekdays	Thirteen Weekdays
Total Adults	78	390	1014
By sex:			
Men	83	415	1079
Women	74	370	962
By age:			
18-24 years	63	315	819
25-34 years	69	345	897
35-44 years	81	405	1053
45-54 years	92	460	1196
55-64 years	87	435	1131
65 years or older	82	410	1066
By education:			
College graduate	100	500	1300
1-3 years college	83	415	1079
High school graduate	77	385	1001
Some high school or less	59	295	767
By household income:			
$60,000 or more	104	520	1352
$50,000-$59,999	95	475	1235
$40,000-$49,999	84	420	1092
$30,000-$39,999	81	405	1053
$20,000-$29,999	73	365	949
$10,000-$19,999	61	305	793
Under $10,000	54	270	702
By occupation:			
Professional, manager	95	475	1235
Technical, clerical, sales	83	415	1079
Precision, craft	71	355	923
Other employed	69	345	897
Not employed	73	365	949

Source: Mediamark Research Inc., Spring 1987

Sunday/Weekend Newspaper Gross Rating Points (GRPs)
(One, five and thirteen Sundays)

	One Sunday	Five Sundays	Thirteen Sundays
Total Adults	73	365	949
By sex:			
Men	74	370	962
Women	72	360	936
By age:			
18-24 years	66	330	858
25-34 years	68	340	884
35-44 years	77	385	1001
45-54 years	83	415	1079
55-64 years	80	400	1040
65 years or older	72	360	936
By education:			
College graduate	91	455	1183
1-3 years college	82	410	1066
High school graduate	75	375	975
Some high school or less	52	260	676
By household income:			
$60,000 or more	95	475	1235
$50,000 - $59,999	89	445	1157
$40,000 - $49,999	84	420	1092
$30,000 - $39,999	77	385	1001
$20,000 - $29,999	68	340	884
$10,000 - $19,999	59	295	767
Under $10,000	47	235	611
By occupation:			
Professional, manager	89	445	1157
Technical, clerical, sales	80	400	1040
Precision, craft	70	350	910
Other employed	66	330	858
Not employed	68	340	884

Source: Mediamark Research Inc, Fall 1987

The Reading of Daily Newspapers

Average number of times read or looked at and
average time spent reading dailies yesterday
by day of the week and number of papers read*

	Avg. No. Times Read/Looked at Newspaper	Avg. Time Spent Reading (minutes)
Monday		
Read one daily	1.5	38
Read two or more dailies	3.0	61
Tuesday		
Read one daily	1.5	40
Read two or more dailies	2.7	59
Wednesday		
Read one daily	1.5	38
Read two or more dailies	3.1	59
Thursday		
Read one daily	1.6	42
Read two or more dailies	3.2	72
Friday		
Read one daily	1.6	39
Read two or more dailies	2.8	58
All Yesterday Readers (Total N = 1,352)	1.8	44

* Audits & Surveys, Inc, 1982: National sample of 1,979 adults interviewed in person about "yesterday's" newspaper reading. Interviews were equally distributed across the week, Tuesday through Saturday; "yesterday reading" behavior was probed for three dayparts.

Source: Newspapers in American News Habits,
Newspaper Advertising Bureau, 1986.

Page Opening:
Daily Newspaper Pages or Sections Usually Read

(Total adult readers, by sex)

	Percent of Weekday Audience:		
	Adults	Men	Women
Usually read every page	63%	63%	62%
Read certain pages or sections	37	37	38
Business, finance	76	78	74
Classified	76	76	76
Comics	76	76	77
Editorial page	78	77	79
Food, cooking	77	71	82
General news	92	92	93
Home furnishings, gardening	74	71	78
Sports	80	88	72
TV, radio listings	76	75	78
Projected base: Average weekday audience (in 000s)	(107,753)	(52,597)	(55,156)

Source: Simmons Market Research Bureau, 1986 Study of Media & Markets.

For details on other demographic segments, see:
Daily Newspaper Page Opening: Pages and Sections Usually Read, Newspaper Advertising Bureau, 1987.

Reach, Frequency and Gross Rating Points for Daily Newspapers at Varying Levels of Penetration

	Number of Weekday Issues:				
	One	Two	Three	Four	Five
Gross Rating Points	15	30	45	60	75
Net Reach	15%	19%	22%	23%	25%
Average Frequency	1.0	1.6	2.0	2.6	3.0
Gross Rating Points	20	40	60	80	100
Net Reach	20%	26%	29%	31%	33%
Average Frequency	1.0	1.6	2.1	2.6	3.0
Gross Rating Points	25	50	75	100	125
Net Reach	25%	32%	36%	39%	41%
Average Frequency	1.0	1.6	2.1	2.6	3.0
Gross Rating Points	30	60	90	120	150
Net Reach	30%	38%	43%	46%	48%
Average Frequency	1.0	1.6	2.1	2.6	3.1
Gross Rating Points	35	70	105	140	175
Net Reach	35%	45%	50%	54%	56%
Average Frequency	1.0	1.6	2.1	2.6	3.1
Gross Rating Points	40	80	120	160	200
Net Reach	40%	51%	57%	61%	64%
Average Frequency	1.0	1.6	2.1	2.6	3.1
Gross Rating Points	50	100	150	200	250
Net Reach	50%	64%	71%	75%	78%
Average Frequency	1.0	1.6	2.1	2.7	3.2

These estimates assume a turnover rate of 28%, which is average for metropolitan newspapers. Since reach and frequency patterns for individual newspapers vary, these estimates should be used only in the absence of local data.

For $10 per copy, postpaid, member newspapers and advertisers can obtain a 5 1/4" diskette that calculates reach and frequency up to 13 issues. It can be run on a Lotus 1-2-3[a] program installed on an IBM PC or compatible. The only input required is net percent coverage for one and two issues. To order, write Research Dept.; Newspaper Advertising Bureau; 1180 Avenue of Americas; New York, NY 10036.

a) Both Lotus and 1-2-3 are registered trademarks of Lotus Development Corporation.

Number of Daily and Sunday Newspapers in the United States

Year	Morning	Evening	All Day	Total Daily	Sunday
1985	456	1,196	26	1,678	798
1986	470	1,161	30	1,661	803
1987	489	1,135	31	1,655	815

Circulation of Daily and Sunday Newspapers in the United States
(in millions)

Year	Morning	Evening	Total Daily	Sunday
1985	36.4	26.5	62.9	58.8
1986	37.6	25.1	62.7	58.9
1987 (Prelim)	38.8	23.9	62.6	60.2

(Circulation of all-day newspapers is apportioned between "Morning" and "Evening".)

1986 Newspaper Data for Canada

	Morning	Evening	Total Daily	Sunday/ Weekend
Number of newspapers	29	82	108	21
Circulation (millions)	3.1	2.3	5.4	3.3

(Three all-day newspapers counted both in AM & PM columns, but only once in the total. Circulation for these papers is equally divided between AMs and PMs.)

How Much Do People Spend to Read Daily and Sunday Newspapers?
1986 Estimate of Annual Expenditures in the United States
(in billions of dollars)

Weekday	Sunday	Total
$5.41	$2.64	$8.05

Sources: SRDS, Editor and Publisher Yearbook; ABC; CARD.
Prepared by Newspaper Advertising Bureau, Inc.

Readers-per-Copy Estimates for Total U.S.

	Weekday	Sunday/Weekend
Adults	2.12	2.12
Men	1.07	1.02
Women	1.05	1.10

Sources: Estimate by Newspaper Advertising Bureau, based on 1986 SMRB Study of Media & Markets; Editor and Publisher Yearbook, 1986.

Weekday Newspaper Readers-per-Copy in Top 50 ADIs

Total: Top 50 ADIs	2.62
Markets 1 - 10	2.76
Markets 11 - 25	2.61
Markets 26 - 50	2.56

Source: Scarborough's 1987 Newspaper Audience Ratings Study.

Average Weekday Coverage of Professionals and Managers

	Total U.S. (in millions)	Daily Readers (in millions)	Percent of Total
Total professionals & managers	26.8	18.6	69%
Individual employment income of $35,000 & over	9.0	7.1	79%
College graduate	16.3	11.6	71%
Involved in PC or EDP computer purchase decisions	4.2	3.1	74%
Manage or influence investments of institutional or corporate funds	1.3	1.0	80%

Source: Mediamark Research Inc, 1987

The size of the daily audience varies little over the five weekdays...

Index of Daily Newspaper Readership by Adults

	Average Weekday	Monday	Tuesday	Wednesday	Thursday	Friday
Total adults	100	98	100	102	100	101
Men	101	99	101	102	102	100
Women	99	97	98	102	98	101

Source, Audits & Surveys, Inc, 1982.

...mainly because most newspaper readers are subscribers.

How Daily Newspapers Read Yesterday Were Obtained

	Weekday	Sunday
Subscribe, delivery	70%	63%
Bought single copy	20	31
Family member brought home	2	2
Obtained otherwise	8	4

Source: Response Analysis Corporation, 1986.

And newspaper reach is virtually constant throughout the year.

Index of Month-by-Month Circulation

	J	F	M	A	M	J	J	A	S	O	N	D
AM	101	101	101	101	100	99	97	98	99	101	101	100
PM	99	100	100	100	100	100	99	99	100	101	101	101
Sun/wknd	100	101	101	101	100	99	98	98	100	101	101	100

* Average month circulation = 100.

Source: Media General, Inc, survey of ICMA members. Data cover the years 1976-1980 and are weighted by circulation size and geographic region to represent national totals.

Creativity in Newspaper Advertising

Creativity is the vital ingredient for success in any advertising medium. An extensive analysis of readership scores for newspaper ads shows that the Starch Noted scores for two ads of the same size and product category can vary by ratios of as much as two to one.

The Creative Newspaper, available through NAB's members, reproduces outstanding creative efforts in every advertising category, and shows how progressive advertisers are taking advantage of the newspaper's new color capabilities and improved reproduction.

"Objective" characteristics such as the use of a package illustration or the position of the headline, account for only small differences in attention value and interest, and formulas that recommend using overworked headline words like "new" cannot guarantee high readership.[1]

The use of very general principles can be helpful: Keep the layout uncluttered. Suit the artwork to the newspaper medium. Use illustration and headline to communicate product benefits. However, general principles have limited value if the creative spark is missing.

---

1) For further details, see: Research Facts on Position, Timing and Creativity, Newspaper Advertising Bureau.

Estimating Ad Readership

Page opening is the accepted measure of opportunity for advertising exposure. Other measures, such as Starch "Noted" scores, are also widely used as indications of a specific ad's attention value. It is well known that any such measure varies with the nature of the advertised product, size of ad and creative treatment.

Only a readership survey can provide reliable clues to a specific ad's attention value, but in the absence of a survey, average reported readership for a large number of ads may be useful. Average reported readership figures also provide a useful benchmark for evaluating the performance of individual measured ads.

Percent of Ads Read on Opened Pages (by size of ad)	
Less than one-quarter page	12%
One-quarter to less than half page	17%
Half to less than full page	25%
Full page or more	44%

Source: Audits & Surveys, Inc, 1982. (Unweighted base is 16,605 ads of five column inches or more appearing on randomly selected sample pages of newspapers read "yesterday". For more details, see Newspaper Pages, Ads and Readers, Newspaper Advertising Bureau, 1984.)

Ad readership varies little whether the ad appears on the left or right side of the page...

	Left	Right
Men	99	102
Women	100	100

...above or below the fold...

	Above Fold	Below Fold
Men	99	101
Women	100	100

...or in the gutter or outside position.

	Gutter	Outside
Men	100	101
Women	101	100

But...editorial environment can affect performance.

Advertisements for Products of Interest to Both Men and Women

Type of Page:	Men	Women
Sports	114	49
Food, home	63	101
General news	100	101

NOTE: Index - Starch "Noted" score for average ad = 100.

Source: MMN Starch studies of 32,000 newspaper ads. For more details, see Research Facts on Position, Timing and Creativity, Newspaper Advertising Bureau, 1986.

Multiple Insertions: How Advertising Exposure Accumulates

Obtaining direct measures of the number of people reached by multiple ad insertions is impractical, whatever the medium. However, if it can be assumed that the likelihood of newspaper readers seeing one or more ads in a campaign is approximately the same as the likelihood of seeing one or more in a single newspaper issue with the same total number of insertions, it is possible to estimate the cumulative effect of multiple insertions.

The first step is to establish the average exposure level for a single insertion, either through custom research or by the use of an estimate. Given this base figure, it can be assumed that multiple insertions will build along the lines shown in the following table.

Estimated Net Reach and Frequency for Multiple Ad Insertions

Average for Single Insertion:	Number of Ads in Campaign:					
	Two	Three	Four	Five	Six	Seven
20% net reach:*	30%	38%	45%	50%	55%	58%
avg. freq:	1.3	1.6	1.8	2.0	2.2	2.4
25% net reach:	37%	46%	53%	59%	63%	66%
avg. freq:	1.4	1.6	1.9	2.1	2.4	2.6
30% net reach:	43%	53%	61%	67%	71%	74%
avg. freq:	1.4	1.7	2.0	2.2	2.5	2.8
35% net reach:	50%	60%	68%	74%	78%	80%
avg. freq:	1.4	1.8	2.1	2.4	2.7	3.1
40% net reach:	55%	65%	73%	79%	83%	85%
avg. freq:	1.5	1.8	2.2	2.5	2.9	3.3
45% net reach:	60%	70%	78%	84%	87%	89%
	1.5	1.9	2.3	2.7	3.1	3.5

* Net reach = percent of exposed audience reached one or more times.

Source: "Yardstick of Accumulative Newspaper Ad Readership"

Newspaper Advertising Expenditures*
(billions of dollars)

	National	Retail	Classified	Total
1981	2.3	9.7	4.6	16.5
1983	2.7	11.8	6.0	20.6
1984	3.1	12.8	7.7	23.5
1985	3.4	13.4	8.4	25.2
1986	3.4	14.3	9.3	27.0
1987	3.5	15.2	10.7	29.4

* Production costs included.

Source: NAB estimates (ADEST).

Newspaper Insert Advertising Volume

	Free-Standing Inserts (Card & Multi-Page) (billions)	Free-Standing Insert Revenue** (billions)
1980	27.7	$2.0
1982	30.0	$2.5
1984	41.3	$3.7
1985	45.4	$4.2
1986	51.5	$4.9
1987	54.8	$5.4

** Printing costs included.

Estimated Tabloid (10 3/4" x 13") Insert Costs For All Sunday Newspapers Published Within PMSA

PMSA (Top)	Number of Newspapers	Circulation in Millions	Cost per 1,000				
			2 Pages	4 Pages	8 Pages	12 Pages	16 Pages
10	46	15.5	36.76	37.34	43.35	48.85	53.07
25	107	23.9	36.80	37.44	43.37	49.04	53.31
50	167	33.5	36.33	37.75	43.50	49.14	53.48
75	221	39.2	36.85	38.26	43.69	49.27	53.64
100	259	42.6	36.86	38.27	43.78	49.34	53.75
150	327	47.5	36.89	38.42	44.10	49.52	54.06
200	387	50.7	36.93	38.58	44.37	49.70	54.19
250	431	52.4	37.01	38.80	44.61	49.97	54.37
315	493	54.4	37.22	39.08	44.86	50.19	54.54

Sources: Circulation '86/87; individual newspapers;
Newspaper Advertising Bureau.

ROP Color: Availability and Premiums

The great majority of newspapers offer ROP color advertising. In the 317 MSA markets, SAU™ quarter-page ads in BW&1C can reach 68% of the total weekday circulation. Full-page ads in BW&3C can reach 88% of the total circulation.

Cumulative Percent of Total Circulation Represented by Daily Newspapers Offering ROP Color[a]

	Accept SAU Full-Page Ad		
	One Color	Two Colors	Full Color
Top 50 MSAs	92%	83%	82%
Top 100 MSAs	94	86	85
Top 200 MSAs	95	88	87
All 317 MSAs	95	89	88

a) All daily newspapers with at least .05 ratio of circulation to households, or more than 25,000 circulation in the MSA.

Percent Color Premium Above Black and White Cost

	SAU Full Page		
MSA Rank	One Color	Two Colors	Full Color
1 - 100	10%	14%	16%
101 - 200	10	14	18
201 - 317	10	15	20
Total 317	10%	14%	17%

Sources: ANM Circulation '85/'86; SRDS, August 1986.
Prepared by Newspaper Advertising Bureau.

TOTAL U.S. ADVERTISING VOLUME
(Billions of dollars)

	1985		1986		1987	
Medium:	Billions	% Share	Billions	% Share	Billions	% Share
Newspapers total	$25.2	26.6%	$27.0	26.4%	$29.4	26.8%
national	3.4	3.5	3.4	3.3	3.5	3.2
local	21.8	23.0	23.6	23.1	25.9	23.6
Magazines total	$ 5.2	5.4%	$ 5.3	5.2%	$ 5.6	5.1%
weeklies	2.3	2.4	2.3	2.3	2.5	2.2
women's	1.3	1.4	1.4	1.3	1.5	1.3
monthlies	1.6	1.7	1.6	1.6	1.7	1.5
Farm Publications	$ 0.2	0.2%	$ 0.2	0.2%	$ 0.2	0.2%
Television total	$20.8	21.9%	$22.6	22.1%	$23.5	21.4%
network	8.3	8.7	8.6	8.4	8.8	8.0
spot	6.0	6.3	6.6	6.4	6.8	6.2
cable (national)	0.6	0.7	0.8	0.7	0.9	0.8
local	5.7	6.0	6.5	6.4	6.8	6.2
cable (local)	0.1	0.1	0.2	0.2	0.2	0.2
Radio total	$ 6.5	6.8%	$ 6.9	6.8%	$ 7.2	6.6%
network	0.4	0.4	0.4	0.4	0.4	0.4
spot	1.3	1.4	1.3	1.3	1.3	1.2
local	4.8	5.1	5.2	5.1	$ 5.5	5.0
Direct Mail	$15.5	16.4%	$17.1	16.8%	$19.0	17.3%
Business Papers	$ 2.4	2.5%	$ 2.4	2.3%	$ 2.5	2.3%
Outdoor total	$ 0.9	1.0%	$ 1.0	1.0%	$ 1.0	0.9%
national	0.6	0.6	0.6	0.6	0.6	0.6
local	0.3	0.4	0.4	0.4	0.4	0.4
Miscellaneous total	$18.2	19.2%	$19.6	19.2%	$21.2	19.3%
national	9.6	10.1	10.2	10.0	11.0	10.0
local	8.6	9.1	9.4	9.2	10.2	9.3
Total National	$53.4	56.3%	$56.9	55.7%	$60.6	55.2%
Total Local	$41.4	43.7%	$45.3	44.3%	$49.1	44.8%
GRAND TOTAL	$94.8	100.0%	$102.1	100.0%	$109.8	100.0%

Estimates include all costs: time & talent, space & production. Sources: McCann-Erickson, Inc; Newspaper Advertising Bureau. Prepared by Research Department, (212) 704-4561. Individual entries may not add to total because of rounding.

Newspapers continue to be the number-one medium for coupons.

Distribution Pattern of Manufacturers' Cents-Off Coupons

	1986	1985	1984
Newspapers	83.7%	82.2%	82.1%
ROP Solo	7.4	12.2	17.3
Co-op (All)	7.1	8.0	10.0
Free-Standing Insert	68.0	59.9	51.5
Sunday Magazine	1.2	2.1	3.3
Magazines	6.5	8.6	8.5
Direct Mail	4.0	4.4	4.4
In/On Package	5.8	4.8	5.0

Source: Manufacturers Coupon Control Center, 1987.

MC3 also reports that consumer use of coupons surged in 1986. In all, consumers redeemed 7.32 billion manufacturer coupons this past year, based on industry estimates developed by Manufacturers Coupon Control Center. This reflects a 13% increase over the 6.49 billion coupons redeemed in 1985. In the last four years, redemption of coupons increased by 63%, rising from 4.48 billion in 1982 to 7.32 billion during this latest year.

Using coupons, consumers saved a total of $2.75 billion on their shopping bills in 1986.

Food Shopping

The homemakers who spend the most on groceries are the best newspaper readers.

Amount Spent in Average Week:	Coverage Average Weekday	 Average Sunday
$40 or less	56%	56%
$41 - $70	62	65
$71 or more	65	69

About one third of those doing major food shopping within the past four weeks favor "no particular day" of the week. 46% do their major food shopping on Thursday, Friday or Saturday.

Major Food Shopping - Day of Week Usually Shop

	Adults	Men	Women
Monday	4%	3%	5%
Tuesday	4	4	4
Wednesday	7	7	6
Thursday	10	9	10
Friday	18	18	19
Saturday	18	18	19
Sunday	4	4	4
No particular day	35	37	33
Projected totals (in millions)	(124.4)	(48.6)	(75.8)

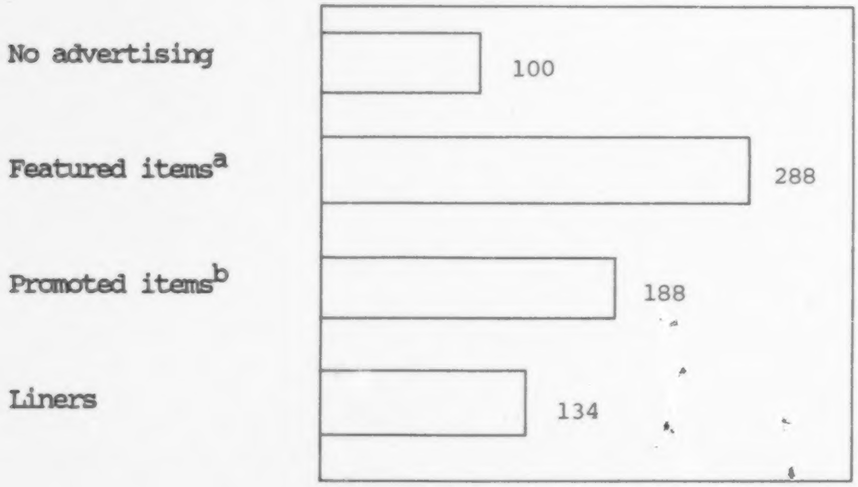
Source: Simmons Market Research Bureau, 1986 Study of Media & Markets.

How Newspaper Advertising Affects Package Goods Sales

In 1980, computerized scanner records were used to analyze the effect of ad linage and price cuts on product movement. The analysis covered 479 items appearing in ads for 17 stores. Unit and dollar sales were recorded for the week of the ad and two weeks before (the base period).

Results show that, on average, newspaper advertising triples volume for items advertised at cut prices. The sales effectiveness of newspaper ads doesn't depend on price cuts--advertising goods at regular prices doubles sales.

Sales results for items advertised at regular prices are closely tied to the amount of advertising space:



---

a) Four square inches or more.

b) Larger than a liner but less than four square inches.

Retail Shopping

Percent of This Week's Purchases Not Planned Last Week

	Percent Unplanned
Women's wear (average, all items)	86%
Men's wear	82
Children's, infants' wear	85
Stationery, gift items	76
Major appliances, TV, stereo	88
Furniture, furnishings	79
Household textiles, sewing items	85
Housewares and supplies	95
Sporting goods	85

Advertising Influence on Last Unplanned Purchase

	Saw or Heard Advertising		Source of Advertising
Total reporting unplanned purchase	41%	=	100%*
Newspaper			60%
Television			17
Direct Mail			15
Magazine			6
Radio			5
Something left at door			3
No answer			1

* Total exceeds 100% because of multiple answers.

Source: Response Analysis Corporation, 1982.

(For more details, see How America Shops and Buys, Newspaper Advertising Bureau, 1983.)

For men, the most popular day for general merchandise shopping is Saturday. For women, it's "no special day".

Day of Week Main Shopping Likely to Occur
(Women)

	Toiletries, Drugs	Clothing	Sheets, Towels, etc	Appliances	New Car
Monday.............	7%	6%	5%	5%	6%
Tuesday............	5	4	3	3	2
Wednesday..........	9	7	6	3	4
Thursday...........	15	5	5	3	4
Friday.............	20	11	9	6	8
Saturday...........	16	34	32	33	27
Sunday.............	2	2	3	3	3
No special day.....	25	31	35	43	45

(Men)

	Clothing	Appliances	New Car
Monday..............	5%	5%	8%
Tuesday.............	4	4	2
Wednesday...........	6	5	4
Thursday............	5	4	4
Friday..............	16	12	10
Saturday............	42	42	39
Sunday..............	2	2	4
No special day......	19	26	29

Source: R. H. Bruskin Associates, The Bruskin Report, #128, October 1984.

Most Believable Advertising Medium

	Percent Selecting
Newspaper	48%
Television	21
Direct mail	8
Magazines	8
Radio	4
All media equally believable	5
No answer	6

Source: Henry Senft Research Associates, Inc., 1986

The Selling Power of ROP Color

Advertisers know that color increases the effectiveness of their ads. Color attracts attention, generates excitement and enhances the appeal of advertising.

A 1985 split-run study[1] by four newspapers testing 12 ads showed that the color ads outsold the same ads in black and white by 42%.

---

1) For further details, see The Selling Power of ROP Color, Newspaper Advertising Bureau, 1986.

Consumers in the Classified Marketplace

The classified pages of daily and Sunday newspapers constitute a massive marketplace. Even when Americans aren't actively looking for a car, a job or a home, many try to keep up with ongoing trends in these three vital areas of living:

Percent of Adults Who Try to Keep up with Trends

In car models, prices, etc.	33%
In the job market, salaries, etc.	37%
In real estate, housing prices, etc.	41%

For keeping up with automotive, employment and real estate trends, the main sources of information are the daily and Sunday newspaper, especially the classified pages:

Main Source of Information on Trends

	Automotive	Employment	Real Estate
Classified ads, daily or Sunday newspaper	59%	59%	63%
Friends, relatives, coworkers	17	35	28
Television, TV	18	9	3
Magazines	11	10	5
Weekly newspapers, classified	5	4	7
Radio	2	3	1
Car dealers, lots	12	NA	NA
Union, trade association	NA	6	NA
All other mentions	11	13	20
Base: Those who like to keep up with trends	(382)	(435)	(465)

Source: Response Analysis Corporation, 1986.

Advertising-to-Sales Ratios for Selected Retail Stores and Services (1986)

	Ad Dollars as Percent of Sales
Amusement & recreation services (misc)	4.8%
Apparel & accessories stores	2.4
Auto dealers & gas stations	3.2
Automotive repair & service	2.7
Computer programs & software	3.0
Computer stores	2.9
Data processing services	1.0
Department stores	3.1
Drug & proprietary stores	1.5
Eating places	3.8
Educational services	4.7
Equipment rental & leasing	6.5
Finance services	2.7
Furniture stores	5.8
Grocery stores	1.5
Health & allied services	1.4
Hotels, motels	3.5
Household appliance stores	3.8
Jewelry stores	5.1
Lumber & building materials	2.8
Mobile home dealers	1.3
Motion picture theaters	3.5
Newspaper publishing	2.9
Personal services	6.6
Radio & TV broadcasters	3.8
Radio, TV & music stores	4.9
Real estate agents & managers	3.6
Shoe stores	1.8
Variety stores	2.3

Source: Pansophic Systems, Inc, as reported in *Advertising Age*, October 12, 1987.

Note: Data compiled from financial statements for publicly held companies, not from media auditing services. Figures may not be representative of all businesses in category.

-A8600-8.52F 10/88

NEW VEHICLE PURCHASERS

Who They Are & How They Buy

Newspaper Advertising Bureau, Inc.
1180 Avenue of the Americas
New York, New York 10036
212 921-5080

NEW VEHICLE PURCHASERS

Who They Are & How They Buy

August 1988

© Newspaper Advertising Bureau
1988

TABLE OF CONTENTS

Page

LIST OF TABLES.. v

HIGHLIGHTS.. vii

INTRODUCTION.. xi
  Purpose of the Study................................ xi
  Method of the Study................................. xii

FINDINGS

I. Profiles of New Vehicle Buyers...................... 1
  Domestic and Import Buyers.......................... 3
  Buyers and Primary Drivers.......................... 3
  Experienced Buyers.................................. 4
  Cars, Drivers and Mileage........................... 5
  What They Bought: Cars vs. Trucks................... 7

II. The Purchasing Process............................ 13
  How Many Buyers Had Help?........................... 13
  Timing and Motivations for Buying a New Vehicle..... 16
  The Time Frame for Decision-making.................. 18
  Demographic Differences in Shopping Time............ 20
  Narrowing the Search: Choosing Among Alternatives... 22
  Factors in the Final Selection of a Vehicle......... 25
  Demographic Differences in Selecting a Make and Model....... 29
  Dealer Shopping and Final Negotiations.............. 34
  Shopping Patterns: Timing and Distance.............. 36
  Factors in Dealer Selection......................... 39
  Demographic Differences in Dealer Selection Factors......... 41
  Dealer Offerings and Satisfaction with the Dealer... 44
  Whatever Happened to the Old Clunker?............... 45

III. Advertising and the Search for Information....... 47
  Demographic Differences in Media Use................ 48
  Which Advertising Media Were Most Helpful?.......... 51
  How Often Did They Read the Classifieds?............ 53
  How Helpful ARE the Classified Ads?................. 55
  What Builds Interest in Automotive Classified?...... 56
  Demographic Differences in Advertising Appeal....... 59
  Newspaper Reading and Interest in Automotive Topics......... 61

TABLE OF CONTENTS (Continued)

Page

IV. Ten Market Segments: Sales Information and Buyer Profiles..... 63
  A. Subcompacts.. 63
  B. Small Specialty Vehicles........................... 64
  C. Compacts... 66
  D. Midsize Cars....................................... 66
  E. Fullsize Cars...................................... 67
  F. Luxury Cars.. 69
  G. Sport Specialty Vehicles........................... 69
  H. Compact Pickup Trucks.............................. 71
  I. Compact Vans....................................... 72
  J. Compact Sport Utility Vehicles..................... 73

V. New Vehicle Buyers' Study: Marketing Implications............ 85

APPENDIX.. 89

LIST OF TABLES

Page

1. New Vehicle Buyers: Demographic Profiles.................... 2
2. Purchasers of Cars and Trucks/Minivans...................... 9
3. Price Paid for New Vehicle Purchased........................ 11
4. Who Had Help Shopping for the New Vehicle?.................. 15
5. Reasons for Buying a New Vehicle When They Did.............. 17
6. Time Frame for Shopping and Buying.......................... 20
7. Demographic Differences in Shopping Time: Medians and Percentages Spending Less Than the Median................. 21
8. Were Any Alternative Vehicles Considered?................... 26
9. Factors in Selection of Make/Model Purchased................ 28
10. Importance of Nine Factors in Vehicle Selection............. 30
11. Dealer Visits, Final Price Negotiations, and Test Drives.... 35
12. When Buyers Shopped Dealers................................. 36
13. When Buyers Shopped, by Age................................. 37
14. Factors in Dealer Selection................................. 40
15. Six Factors in Dealer Selection by Demographic Groups....... 42
16. Who Uses Different Ad Media?................................ 50
17. Most Helpful Ad Medium...................................... 52
18. Frequency of Classified Ad Reading When Shopping............ 54
19. Helpfulness of Newspaper Automotive Classified.............. 56
20. Key Ad Copy Points.. 58
21. New Vehicle Buyer Segments: Demographic Profiles............ 75
22. New Vehicle Buyer Segments: Elements of the Purchasing Process....................................... 76

LIST OF TABLES (Continued)

Page

23. New Vehicle Buyer Segments: Leisure-Time Activities.......... 77

24. New Vehicle Buyer Segments: Importance of Four Factors in Deciding When to Buy.................................... 78

25. New Vehicle Buyer Segments: Importance of Fourteen Factors in Choice of Make and Model............................ 79

26. New Vehicle Buyer Segments: Importance of Nine Factors in Choosing a Dealer.. 80

27. New Vehicle Buyer Segments: Information Sources for Shopping.. 81

28. New Vehicle Buyer Segments: Ratings of Newspaper Automotive Classifieds.................................... 82

29. New Vehicle Buyer Segments: Attention-Getting Features of Newspaper Ads.. 83

A.1 January 1988 Sales and Sample Weighting..................... 91

A.2 Vehicle Classifications...................................... 92

A.3 Choice of Domestic or Import Vehicles by Demographics........ 94

A.4 Base Numbers Used in this Report............................ 95

Chart 1 - Vehicle Platforms and Sample Makes and Models.......... 8

HIGHLIGHTS

1. Most new vehicle buyers enter and exit the automotive market fairly quickly. The median time spent gathering information was three weeks; two weeks were spent visiting dealers; and one week elapsed between the time a make and model was chosen and the actual purchase. The better-educated and those with higher incomes spent more time completing their purchase (pp. 18-22).

2. On average, new vehicle buyers visited three different dealers during the shopping process. One-fourth (24%) visited only one dealer, and fully 66% visited not more than three. Nearly eight in ten made only one or two trips to negotiate a final price with the dealer. Test drives are serious business: most tested only one or two different new vehicles before buying (pp. 34-36).

3. All-week shopping is the norm. Fully two-thirds said they shopped for a new vehicle on weekdays and weekends equally (35%), mostly on weekdays (16%), or mostly on weekends (14%). Only 11% reported shopping only on the weekends, and 24% reported weekday-only shopping (pp. 36-37).

4. When they wanted information on new vehicles, buyers turned to the print media. Dealer/manufacturer's brochures were the most frequently named source of information (62%), followed by newspaper ads (43%), magazine ads (37%), and television ads (35%). Few utilized auto traders, radio ads, or outdoor advertising as sources of information (pp. 47-51).

5. New vehicle buyers are strong newspaper customers. Seven in ten (72%) have a local daily or Sunday paper delivered to their home; 58% have both editions delivered. Two-thirds (66%) said they read a daily paper every day or most days of the week, and 74% read three of the last four Sunday papers (pp. 61-62).

6. Newspapers are the prime source used when selecting dealers to visit. Half (53%) chose their newspaper as the most helpful medium, compared to 21% for television, 7% for magazines and 7% for radio. Twelve percent selected other print media, such as manufacturer's brochures or auto traders (pp. 51-52).

7. When shopping, most new vehicle buyers read the automotive classified ads in their local daily newspaper on a regular basis. Six in ten (59%) said they browsed the ads at least once a week; 17% reported daily reading (pp. 53-55).

8. Classified ads let new vehicle buyers shop at home. A majority said the ads were helpful when comparing the selection of vehicles offered by different dealers, making price comparisons, comparing dealer locations, comparing dealer incentives, and estimating the current value of cars and trucks they own (pp. 55-56).

9. More than four in ten (44%) were still reading the automotive classified ads several months after they had purchased their new car or truck. Those who continue to shop the ads tend to read them regularly: 65% read the ads at least once a week. Special automotive sections, where available, are well received. Most reported reading these sections whenever they appear or at least occasionally, or when they're in the market for a new vehicle (pp. 61-62).

10. Buyers want solid, actionable information in classified ads. Price (58%) and warranty information (54%) were most frequently rated as "extremely" or "very" important in getting the buyer's attention. Itemizing available makes and models was also highly rated by one-half of all buyers (pp. 56-60).

11. Men continue to buy the majority of new vehicles, though women now account for 40% of the total market. Compared to the car-owning public as a whole, new vehicle buyers are more likely to be well educated and to have higher incomes. Import buyers tend to be younger and better educated than domestic buyers. They're also more likely to be single. Women purchase 47% of all imported vehicles, but only 35% of all domestics (pp. 1-3).

12. Three-fourths (76%) of all new vehicle buyers had purchased a new car or truck in the past, and 16% had purchased used vehicles. Only 8% had no vehicle-buying experience. More than four in ten (42%) light truck and minivan purchases were made by people who had not previously owned that type of vehicle (pp. 4-5).

13. Six in ten (58%) buyers had some type of help (usually from a spouse or parent) in the purchasing process. Most frequently, help came in the form of visiting dealers (48% of all buyers got this type of help), and helping the buyer decide which specific car or truck to buy (37%). Other help included negotiating a price with the dealer (29%) and selecting dealers to visit (23%). Substantial demographic differences were observed in the patterns of involvement by others (pp. 13-16).

14. Motives given for buying a new vehicle at that particular time included a desire for a new vehicle (57%), a need to replace an older car or truck (50%), a special deal (30%), and a need for an additional vehicle for (27%) home or work (pp. 16-18).

15. Nearly two-thirds (64%) seriously considered another 1988 vehicle, and a few (17%) considered a used vehicle as an alternative to the new car or truck they finally bought (pp. 22-25).

16. Reliability was the number one consideration in vehicle selection, rated "extremely" or "very" important by 88%. Number two was the manufacturer's reputation (79%). Other factors rated highly by a majority included: interior comfort and roominess (74%), low maintenance costs (71%), favorable product reviews (69%), price or deal offered (67%), attractive exterior styling (66%), versatility of the vehicle (62%), availability of parts and service (59%), favorable experience with the make (54%), and overall exterior size (54%) (pp. 25, 27-33).

17. No one medium is considered most helpful by a majority when choosing a make and model. Magazines were named most often (31%), followed fairly closely by newspapers (23%), television (23%) and other print media (21%). Radio had little impact (pp. 51-53).

18. Three-fourths disposed of an older vehicle when they made their recent purchase, either through a trade-in (53%) or by selling it themselves (22%). Of those who sold a vehicle privately, 72% utilized personal networks (talking to friends, putting out notices, etc.), and 34% placed an ad in their local daily newspaper. Only a few reported using an auto trader (page 45).

19. Most people seem to select their dealer based on the "right car at the right price" principle. Of nine factors rated, price (80%) and desired vehicle in stock (76%) were most frequently considered "extremely" or "very" important in dealer selection. Sales staff quality (62%), dealer reputation (59%) and convenient location (51%) were other factors rated highly by buyers. Consistent with a preference for a dealer with the desired vehicle in stock, seven in ten bought from inventory "because they had what I wanted" and 16% did so "because I didn't want to wait for a special order (pp. 39-44)."

20. Convenient location is a factor when visiting dealers, but is not the primary reason for selecting dealers to visit. While 66% visited "mostly conveniently located dealers", more than one-third (34%) "traveled a wide area" to look at cars or trucks (page 38).

21. Nearly all felt the dealer adequately explained the controls and operations of the vehicle, and said the warranty was adequately explained. Fewer said the dealer contacted them after the sale or introduced the buyer to someone in the service department (pp. 44-45)

22. The vast majority (79%) of all buyers of new vehicles in January 1988 own at least one other car, truck or minivan (pp. 5-6).

23. The average new vehicle buyer drives 15,200 miles annually -- substantially more than the car-driving public as a whole (pp. 6-7).

INTRODUCTION

Competition in the automobile industry has never been stronger. While Detroit automakers race to develop a better quality and range of products, imports continue to romance the public. Over the past few years a new emphasis on year-round price competition has emerged, using incentives, rebates, and other promotions. At the same time, Detroit has given increased attention to dealer and customer service in the marketing arena.

The market for new vehicles in the United States has also changed, with greater numbers of women purchasing new cars, and an increase in the popularity of minivans (the "new" stationwagon) and light trucks (including sport utility vehicles) among the buying public. Amidst all these changes, are consumers also changing the ways in which they shop for and purchase new cars and trucks?

Purpose of the Study

The purpose of this study was threefold. First, it sought to profile the demographic and lifestyle characteristics of new vehicle buyers. A second purpose was to explore the purchasing process -- consumers' motivations, the amount of time spent, the sources of information used, the reasons for selecting a particular vehicle and a specific dealer, and the final decision to buy. Finally, the study sought to define the distinctive role played by newspaper automotive classified advertising for vehicle buyers.

Method of the Study

Eligible respondents were defined as the primary decision makers in the purchase of a car or light truck registered in January, 1988. Because the focus of the study was on consumers who purchased vehicles for personal use, business/fleet purchasers were eliminated from the sample list, as were purchasers of full-size vans and heavy duty trucks.

Names were randomly selected from unrestricted state registration lists provided by R.L. Polk, using an "nth" name procedure. At the time of the survey, the 36 unrestricted states accounted for 76 percent of private-sector new vehicle registrations. Restricted states not included in the survey are: Alaska, Arkansas, Connecticut, Florida, Georgia, Indiana, Hawaii, New Jersey, New Mexico, Oklahoma, Oregon, Pennsylvania, South Dakota, Virginia, and Washington.

Initially, 5,000 questionnaires (with a small incentive) were mailed to sampled new vehicle buyers on March 31, 1988. A follow-up post card was sent within five days of that date. Mailings were evenly divided among registrants in each of ten vehicle segments: subcompact, small specialty, compact, mid-size, full-size, luxury, sport specialty, compact pickup, compact van, and compact sport utility. (A full list of the vehicles included in each classification can be found in Table A.2 of the Appendix to this report.)

All field work, including sample design, was carried out by Maritz Marketing Research, Inc., under the supervision of Michael Brereton. A total of 1,863 usable questionnaires were returned by May 9, 1988, for a response rate of 37%. The responses were weighted to represent national sales figures across the ten market segments for January 1988.[1]

Dorothy Shea of the Bureau's Research Department directed the study and prepared this report, with the collaboration of Albert E. Gollin. The assistance of May Florez is gratefully acknowledged.

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[1] See Appendix Table A.1 for details on mail-out procedures and weights used, and Table A.4 for the unweighted bases of respondents in various demographic groups. Copies of the mail questionnaire are available from NAB on request.

I. Profiles of New Vehicle Buyers

Who is most likely to buy a new car or truck[1]? New vehicle buyers are more likely to be male (60%), and married (67%) as opposed to single (19%) or formerly married (14%). While people of all ages buy new car or truck models, half (50%) of all new vehicles are sold to people in the 25-44 "growing family" age group. This probably accounts for the larger household size of these new vehicle buyers relative to the population as a whole (2.9 vs. 2.2 nationally). The proportion of two-earner households is comparable to the national figure.

In addition, fully two-thirds of all new vehicles were sold to those with at least some college or technical training, and a majority (62%) was bought by those with annual household incomes of $35,000 or more. (See Table 1.)

Compared to the general car-owning public,[2] new vehicle buyers are better educated and have higher incomes. MRI data also show that car owners are almost as likely to be female (48%) as male (52%). In this study, women constituted two-fifths of all vehicle buyers or were involved in the decisions made by a sizeable proportion of their spouses.

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[1] The term "truck", as used in this report, refers to a compact pick-up, a compact van or a compact sport utility vehicle.

[2] See data from Mediamark (MRI), Spring 1987.

Table 1

New Vehicle Buyers: Demographic Profiles

	All Buyers	Domestic Buyers	Import Buyers
SEX			
Male	60%	65%	53%
Female	40	35	47
MARITAL STATUS			
Married	67%	71%	62%
Single	19	16	25
Divorced/Separated/ Widowed	14	13	13
AGE			
Under 25	11%	10%	14%
25-34	29	23	41
35-44	21	22	20
45-54	16	16	14
55-64	11	13	8
65+	12	16	3
EDUCATION			
Not High School Graduate	6%	8%	3%
High School Graduate	28	31	22
Some College/Technical School	27	29	24
College Graduate	17	14	22
Graduate Work/Degree	22	18	29
INCOME			
Less than $25,000	21%	21%	19%
$25-34,999	17	16	19
$35-44,999	18	17	18
$45-59,999	17	21	15
$60-99,999	19	17	22
$100,000 +	8	8	7
NO. PERSONS/HOUSEHOLD (Avg.)	2.9	2.9	2.9
NO. INCOME CONTRIBUTORS/ HOUSEHOLD (Avg.)	1.8	1.7	1.8
YEARS OF RESIDENCE IN CITY/TOWN (Avg.)	17.0	19.5	12.6

Domestic and Import Buyers

As Table 1 shows, *import* purchases were fairly evenly divided between men (53%) and women (47%), while men accounted for the majority (65%) of *domestic* car and truck sales. One explanation for this difference is that women were primarily buying smaller, less expensive vehicles, particularly Japanese makes and models.[1]

Compared to domestic buyers, import buyers are more likely to be younger (75% under age 45 vs. 55% of domestic buyers), single, and well-educated (75% with at least some college vs. 61% for domestic buyers). They also tend to be less settled than domestic buyers, with an average of 12.6 years of residence in their current city or town, compared to 19.5 years for domestic buyers. Of course, this is also a function of their more youthful profile. But import and domestic buyers do *not* differ significantly in terms of household size, total household income, or the number of wage-earners.

Buyers and Primary Drivers

While most of the consumers surveyed said they were both the primary decision-maker[2] in purchasing the new vehicle *and* the person who drives that car or truck the most, one-fifth indicated that someone else (usually the spouse) is the vehicle's principal driver. This finding, though perhaps not surprising, is noteworthy, since much automotive research has traditionally focused on drivers in evaluating the automotive marketplace. Unlike those studies, the current research focuses on the buyer -- the primary decision maker.

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[1] Other variations in the choice of domestic or import vehicles are shown in Appendix Table A.3.

[2] The questionnaire was addressed to the vehicle *registrant*, but included instructions to have the *primary* decision maker complete it (when he/she was not the same person.)

Women, singles, the formerly-marrieds, and first-time new vehicle buyers were all more likely to say they play both roles.

The likelihood that the decision-maker and driver were the same decreased as age increased, up to a point (the 35-44 age group). Thereafter, the likelihood increased with age. This pattern is repeated for income, with the "breakpoint" at $45,000 to $59,000. One possible explanation for these patterns is that it is people in the prime of life, with a more favorable financial situation, who are more likely to be buying new vehicles for others in growing families.

Experienced Buyers

Buyers were asked whether or not this was the first vehicle they had ever purchased, and whether this was the first new vehicle they had ever bought. Three in four (76%) reported that they had purchased at least one other new vehicle in the past, indicating that prime prospects for new vehicles are, by and large, experienced buyers. Another 16% had some buying experience, but only with used cars or trucks. Only 8 percent said they have never purchased any vehicle in the past.

As expected, those without any new vehicle buying experience were younger, less likely to be married, and reported lower household incomes (median of $31,000 vs. $45,000) than previous new car and truck buyers.

Throughout the balance of the report, the 24 percent who had never purchased a new vehicle in the past (bought only a used one, never bought anything before) will be referred to as First-Time buyers, while those who had bought a new vehicle previously will be referred to as Experienced buyers.

Light truck and minivan buyers were asked an additional question about any previous purchases of those types of vehicles. Four in ten such purchases (42%) were made by people who had never owned a compact pick-up, van or sport utility vehicle before, which correlates with industry data showing a recent surge of growth of this automotive market segment.

Cars, Drivers and Mileage

New vehicle buyers were asked how many (if any) other cars and trucks were owned/leased by the household, and how many licensed drivers the household contained. Eight in ten (79%) said they or other members of their households own or lease at least one other car, truck or minivan. Of those, three-fourths said they own/lease one (47%) or two (28%) other vehicles. The majority (60%) own (other) cars only. On average, new car/truck buyers report 2.3 licenced drivers per household.

The percentage of households reporting multiple-vehicle ownership varies substantially by income, with one half of those under $25,000 owning another vehicle, compared to 98% of those earning $100,000 or more. In a similar fashion, households to which two or more people contribute their earnings are much more likely (90% vs. 62%) to own/lease at least two vehicles than are one-income households.

Age is also a factor, and here the pattern of ownership follows the life cycle. While 82% of the youngest respondents (under age 25) reported multiple vehicles in the home, fewer (73%) of the 25-to-34 year olds did so. This is probably a function of living on their own, away from home and access to parents' cars. After age 35, the proportion of multiple-vehicle households hovers in the mid- to high eighties until retirement age, when it drops to 57%.

Finally, multiple-vehicle ownership is inversely related to market size, with 76% of those living in the largest markets ("A counties") owning multiple vehicles, vs. 88% of those in the smallest markets ("D counties"). Multiple-vehicle ownership is not related to education, status as a First-time or Experienced buyer, or purchase of a domestic vs. import car or truck.

New vehicle buyers drive an average of 15,200 miles each year, which is substantially higher than the 9,304 miles reported for all passenger cars in 1987 (Hertz Corporation annual estimate). Men clock slightly more miles than women, averaging 16,100 miles compared to women's 13,700 miles. Those without a high school diploma, with incomes below $25,000, or who are over age 55 tend to drive fewer miles annually than others. Interestingly, singles drive more miles, on average, than their married counterparts.

What They Bought: Cars vs. Trucks

The research reported here focuses on people who purchased a new car, truck or minivan primarily for personal use (transportation, recreation) as opposed to business or work-related use (e.g. full-size trucks). The ten vehicle "platforms" or segments utilized for the study are shown in Chart 1, along with a sampling of the automobiles in each classification. All told, seven car platforms and three "truck" platforms were used. The data from respondents in this study were weighted to represent total private-party (retail) sales for these ten vehicle classes in January, 1988. (See Appendix Table A.1)

As Table 2 shows, cars accounted for 74% of total retail sales in January, 1988. While buyers in all demographic groupings show an overall preference for cars, variations are apparent by sex and market size. While 31% of men bought a compact truck, van or sport utility vehicle, only 17% of women buyers did so. These figures are altered slightly when their marital status is taken into consideration: 24% of all married women bought trucks vs. 11% of single women. The higher rate of light truck purchases among married women is probably due to two factors: the influence of their spouses and the need for a "station wagon" type of car (minivans) for errands, transporting children, etc.

Chart 1

Vehicle Platforms and Sample Makes and Models

SUBCOMPACT:	Ford Escort Dodge Omni Toyota Tercel Honda Civic	FULL SIZE:	Buick Electra Mercury Grand Marquis Olds Ninety-eight
SMALL SPECIALTY:	Chevrolet Camaro Pontiac Fiero Toyota Celica Honda Prelude	LUXURY:	Cadillac Seville Lincoln Mark VII Acura Legend Mercedes 560 SL
COMPACT:	Dodge Aries Pontiac Sunbird Honda Accord Mazda 626	SPORT SPECIALTY:	Chevrolet Corvette Porsche 911 Toyota Supra Mazda RX-7
MID-SIZE:	Chevrolet Celebrity Buick Century Ford Taurus Nissan Maxima	COMPACT PICK-UP:	Jeep Comanche Dodge Dakota Isuzu Pick-up Chevrolet S-10
COMPACT VAN:	Dodge Caravan Ford Aerostar Mitsubishi Wagon Volkswagen Vanagon	COMPACT SPORT UTILITY:	Jeep Cherokee Chevrolet Blazer Isuzu Trooper II Suzuki Samurai

Table 2

Purchasers of Cars and Trucks/Minivans

	Cars	Trucks/ Minivans
TOTAL BUYERS	74%	26%
SEX		
Male	69	31
Female	83	17
MARITAL STATUS		
Married Men	69	31
Married Women	76	24
Single Men	68	32
Single Women	89	11
Divorced/Separated/Widowed	80	20
EDUCATION		
Not High School Graduate	72	28
High School Graduate	72	28
Some College/Technical School	70	30
College Graduate	77	23
Graduate Work/Degree	79	21
AGE		
Under 25	76	24
25-34	71	29
35-44	67	33
45-54	74	26
55-64	78	22
65+	89	11
INCOME		
Less than $25,000	76	24
$25-34,999	69	31
$35-44,999	71	29
$45-59,999	77	23
$60-99,999	77	23
$100,000+	70	30
NEW VEHICLE BUYER STATUS		
First-time Buyer	79	21
Experienced Buyer	73	27
MARKET SIZE		
A Counties	77	23
B Counties	76	24
C Counties	67	33
D Counties	64	36

With respect to market size, the propensity to buy a truck or minivan increases as market size decreases. This in and of itself is not surprising information, and conjures up images of cowboy boots and dusty rural roads. However, it is important to note that interest in or access to the great outdoors, difficult terrain (including snow in the suburbs), and family-related needs are among the prime reasons why someone might choose a truck over a car. Further, compact sport utility vehicles have become very popular among trend-setters.

The median price paid for a new car or truck in January 1988 was $12,721. (See Table 3) As would be expected, the investment in a car increased with age and income. The median price paid by those under age 25 was $10,755, while those in the 55-64 category spent $14,173. (Retirees spent a little less: the median for them was $13,636). With respect to income, those with household incomes of under $25,000 spent an average of $10,641, while new cars bought by the wealthy ($100,000+) averaged $15,811. Men, experienced buyers, and those who bought a domestic vehicle typically spent more than others.

Table 3

Price Paid for New Vehicle Purchased

	Median Price
TOTAL BUYERS	$12,721
SEX	
Male	13,165
Female	11,989
MARITAL STATUS	
Married Men	13,318
Married Women	12,828
Single Men	12,464
Single Women	10,973
Divorced/Separated/Widowed	12,282
AGE	
Under 25	10,755
25-34	11,859
35-44	13,731
45-54	12,741
55-64	14,173
65+	13,636
INCOME	
Less than $25,000	10,641
$25-34,999	12,609
$35-44,999	12,175
$45-59,999	13,211
$60-99,999	13,858
$100,000+	15,811
NEW VEHICLE BUYER STATUS	
First-time Buyer	10,744
Experienced Buyer	13,377
TYPE OF VEHICLE PURCHASED	
Domestic	13,280
Import	11,683

QUESTION: What was the total price of your new vehicle including all options and taxes -- that is, the total price agreed upon by you and your dealer? This total should exclude any trade-in allowance or finance charges.

II. The Purchasing Process

This chapter of the report will analyze the steps taken by the new vehicle buyer, alone or with assistance, to complete his or her purchase.

How Many Buyers Had Help?

New vehicle buyers were asked: "Did you decide to purchase this vehicle on your own, or was someone else involved in the decision?" Those who indicated that they did have help were further asked to identify the helper/co-decisionmaker, and what sort of help was provided.

The majority (58%) of all new car and truck buyers said someone else had also been involved in the purchasing process. As Table 4 shows, the likelihood of having help is strongly tied\ to marital status and sex: married women were the most likely to name a helper (77%), followed by married men (64%). Further, about half (52%) of the single women reported getting help, but only one-fifth (21%) of single men buyers did so.

As would be expected, almost all who got help and were married named their spouse. In addition, a few (9%) said their children helped out. However, assistance is rarely obtained from persons outside the immediate family. Assistance from parents, other relatives, or friends was cited by only 2%, 3%, and 2% respectively, of married buyers who involved others in their shopping and buying.

Singles, on the other hand, were most likely to name parents (56%) as a source of assistance, followed by friends (32%) or other relatives (25%). As the sample size for singles obtaining help was very small, however, these results should be viewed cautiously.

New car and truck buyers who said others were involved were asked whether or not their helper(s):

- -- Visited dealer showrooms with the buyer;
- -- Helped decide which dealer to buy from;
- -- Helped decide which make/model to buy;
- -- Helped negotiate the final purchase price with the dealer.

Since from a dealer's perspective it might be more useful to know the incidence of these types of help among the car-buying public as a whole, Table 4 shows percentages based on the entire sample rather than on those who acknowledged getting help from someone.

Table 4

Who Had Help Shopping for the New Vehicle?

	Someone Else Involved	Help Obtained: Dealer Visits	Help Obtained: Dealer Choice	Help Obtained: Vehicle Choice	Help Obtained: Price Nego.
TOTAL BUYERS	58%	48%	23%	37%	29%
SEX					
Male	54%	44%	18%	37%	21%
Female	62	54	30	38	41
MARITAL STATUS					
Married Men	64%	52%	21%	45%	24%
Married Women	77	69	37	54	53
Single Men	21	14	8	10	13
Single Women	52	42	26	26	40
Divorced/Separated/ Widowed	34	27	14	12	16
NEW VEHICLE BUYER STATUS					
First-time Buyer	57%	46%	25%	33%	37%
Experienced Buyer	58	49	22	40	27
TYPE OF VEHICLE					
Domestic	59%	48%	22%	37%	28%
Import	54	47	23	37	30

Question: Did you decide to purchase this vehicle on your own, or was someone else involved in the decision?

(IF "SOMEONE ELSE") How did they help you in the decision process?

Overall, half (48%) of eventual new vehicle purchasers can be expected to walk into a showroom accompanied by someone else. Again, the incidence of this type of help varies by sex and marital status: seven in ten (69%) married women are likely to have company when shopping, compared to only 14% of the single men. While it might be expected that First-time buyers would be more likely to seek support than Experienced buyers, in fact, the two groups show equivalent levels in dealer visits.

Fewer indicated that someone else was instrumental in the final decision concerning the make and model (37%), in negotiating price with the dealer (29%), or in deciding which dealer to buy from (23%). The patterns of assistance at these stages of the purchase are similar to those for dealer visits, with two exceptions. First, women, who are perhaps more intimidated by a "hard sell," are much more likely than men (41% vs. 21%) to have help at the price-negotiation stage. More than half (53%) of all married women had help at this final stage. Second, First-time buyers are slightly less likely than Experienced buyers to have help when selecting a make and model but more likely to have someone else involved during price negotiations.

Timing and Motivations for Buying a New Vehicle

Buyers were asked to rate four reasons for buying a new vehicle at the particular *time* they did. A five-point scale of importance was utilized for these ratings (see Table 5).

Table 5

Reasons for Buying a New Vehicle When They Did

	Extremely/ Very Important	Extremely Important	Very Important	Somewhat Important	Not too/ Not at all Important
Wanted a New Vehicle	57%	27%	30%	23%	20%
Old Vehicle Needed Replacing	50	34	16	16	34
Attracted by a Special Deal	30	14	16	21	49
Needed an Additional Vehicle for Work or Family	27	14	13	7	66

QUESTION: How important were each of the following in your decision to buy a new vehicle at the particular time you did?

While reasons for purchase at that time varied according to an individual's needs, it is interesting that the most important reason was simply that the buyer "wanted a new vehicle (for better options, better performance, just wanted one, etc.)." Nearly six in ten (57%) cited this reason as extremely or very important to their decision. Singles (64%) and those under age 25 (71%) were much more likely than others to cite this reason. First-time buyers (65%) were also more likely than others to find the ownership of a new vehicle especially attractive as an alternative.

Half (50%) noted that an old vehicle needed to be replaced (due to repairs, damage, age, etc.), one-quarter citing it as an extremely important consideration. This reason was more frequently cited by women than men (61% vs. 44%), particularly by single women (69%). Less likely to claim replacement needs as a highly important motive were older buyers (36% of 55-64 year-olds; 23% of those age 65 and older), and those in the smallest markets (37% of all D-county buyers).

A special deal (30%) or the need for an additional vehicle (27%) strongly influenced the timing of the purchase of fewer buyers. A special deal was more likely to motivate First-time buyers than Experienced buyers (35% vs. 28%), and people of more limited means: 38% of those earning under $25,000 said it was highly important, compared to 23% of those making $60,000 or more. Not surprisingly, the need for an additional vehicle (cited by 27%) was more frequently noted by married women (37%), and less frequently mentioned by singles and those age 55 or older.

The Time Frame for Decision-making

It's probably fair to say that no two people go about shopping for a new car or truck in exactly the same way. For some the process may take weeks or even months, while others will purchase in a day or two. In order to establish some norms in the shopping process, new vehicle buyers were asked to estimate (in weeks) the following: "How long before you finally signed a contract to buy your new vehicle did you...

— Start gathering information about
new vehicles?

— Visit your first dealership?

— Decide on the exact make and model
you selected?"

Asking buyers who had bought a vehicle only two-to-three months earlier to work back from a specific event -- contract-signing -- makes it more likely that time periods will be recalled accurately.

Overall, the elapsed-time results show that most people tend to make their decisions in a "rational" order. That is, new vehicle buyers are likely to start gathering information before they visit dealers, and to visit a dealer before settling on the exact car or truck they eventually buy (for example, a black Mazda RX-7 with tape deck and moon roof). The median time that elapsed between the onset of information-gathering and purchase was three weeks, compared to two weeks for the first dealer visit and one week for final vehicle selection.[1] (See Table 6)

The results show that the overall time frame for shopping is fairly tight, with half of all buyers completing the entire purchasing process, from gathering information to buying the car or truck, in 3 weeks or less. In fact, just over one in four buyers (27%) said they started gathering information only one week before purchasing.

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[1] Median time means that half of all buyers spent the indicated amount of time or less, while half spent more time.

Table 6

Time Frame for Shopping and Buying

Time Spent Prior to Final Purchase	Began Gathering Information	Began Visiting Dealers	Final Vehicle Selection
One Week	27%	34%	53%
Two Weeks	14	18	16
Three Weeks	11	12	9
Four Weeks	10	11	5
Five Weeks or More	38	25	17
	100%	100%	100%
MEDIAN TIME	3 Weeks	2 Weeks	1 Week

However, as Table 6 shows, not everyone zipped through these stages so quickly. Fully 38% spent more than five weeks gathering information and one-quarter (25%) spent more than a month visiting dealers. In fact, one-sixth (17%) had the specific car or truck picked out long before they actually signed a contract for it.

Demographic Differences in Shopping Time

The amount of time spent shopping for a new vehicle is related to a number of demographic variables. Table 7 shows the proportion in each group (e.g., those under age 25) who completed each stage of the purchase process by the median amount of time or less.

Table 7

Demographic Differences in Shopping Time:
Medians and Percentages Spending Less Than the Median

	Began Gathering Information	Began Visiting Dealers	Final Vehicle Selection
MEDIAN TIME SPENT	3 Weeks	2 Weeks	1 Week
TOTAL BUYERS	52%	53%	53%
MARITAL STATUS			
Married Men	49%	50%	51%
Married Women	48	47	55
Single Men	48	48	52
Single Women	60	64	61
Divorced/Separated/ Widowed	62	62	57
EDUCATION			
Not High School Graduate	66%	58%	60%
High School Graduate	55	55	60
Some College/Technical School	55	51	54
College Graduate	48	51	52
Graduate Work/Degree	44	50	46
AGE			
Under 25	59%	58%	59%
25-34	49	51	52
35-44	47	47	48
45-54	49	51	52
55-64	47	53	55
65 +	70	63	65
INCOME			
Less than $25,000	63%	57%	62%
$25-34,999	57	59	56
$35-44,999	48	49	48
$45-59,999	47	49	57
$60-99,999	46	46	48
$100,000 +	44	47	44
NEW VEHICLE BUYER STATUS			
First-time Buyer	54%	50%	53%
Experienced Buyer	51	53	54
TYPE OF VEHICLE			
Domestic	55%	56%	54%
Import	46	47	52

QUESTION: How long before you finally signed a contract to buy your new vehicle did you...start gathering information about cars? Visit your first dealership? Decide on the exact make and model you selected?

As Table 7 shows, single women and the formerly-married appear to be the "fastest" shoppers. Sixty percent of all single women and 62% of the formerly-married completed the entire shopping process in three weeks or less, compared to about one-half of other buyer groups.

In general, shopping time increases with education and income. For example, while two-thirds (66%) of those without a high school diploma (66%) completed the process in three weeks or less, only 44% of those with post-graduate work did so. Similarly, 59% of those under age 25 gathered information for three weeks or less, compared to 47% of those age 55-64. Senior shoppers (65+) typically were swift: 70% finished in three weeks or less.

Narrowing the Search: Choosing Among Alternatives

In the previous section it was noted that about half of all buyers made their final selection of make and model one week prior to purchase. This suggests that most people select from among a set of alternatives. In a majority of cases, this assumption is valid: 64% of all new vehicle buyers said they seriously considered some other 1988 vehicle, and 17% considered a used car or truck as an alternative to the new vehicle they actually bought.

Of the nearly two-thirds (64%) who thought of buying another make and model, 41 percent only considered a car, 10 percent only a truck or minivan, and 13 percent gave some thought to both types. The choice within each of the exclusive alternatives was highly focused: almost all of those who considered only one of these two types of vehicle (cars or trucks) ended up buying within that type. But among those who explored both types, the final decision tilted in favor of buying a car, by 60:40%. This split can be compared with the overall 74:26% ratio of car buyers to truck buyers in the sample, suggesting that the perception of trucks and minivans as a plausible alternative tends to work in their favor when a final decision is made.

Similarly, the 64% who considered a variety of makes and models could choose among domestic or import vehicles. In this case, the search among alternatives was conducted more widely: one-half (32%) gave some consideration to both, 23 percent only to domestic makes, and 9 percent only to imports. Again, almost all of those who considered only one of the two (domestic or import) ended up buying a vehicle within that class. But among the half who did some comparison-shopping among both, just over half (52%) decided in favor of an import. This translates into one-sixth of all new vehicle buyers opting for an import after comparing it with some domestic make and model -- a strong indicator of the capacity of imports to gain market share once they gain a share of the attention of prime prospects.[1]

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[1] The alternatives that buyers in each of the ten vehicle segments considered and bought are shown in Table 22, page 76.

Another important influence on the final choice between a domestic or import model is whether other vehicles of either type are already part of the household. As noted earlier, almost four-fifths (79%) of these new vehicles joined another one (or more) owned by the buyer or some other household member. In homes where only domestic models were owned (58% of all homes owning another car), the final choice split 78:22% in favor of buying a domestic vehicle. But in homes with only import models (comprising 20% of all car-owning homes), the split was 64:36% in favor of an import model. And in homes with both types of cars already present at the time this new vehicle was bought (22% of car-owning homes), the split was 51:49% in favor of an import model. Thus, the current ownership of an import by the household appears to have substantially affected the final buying decision in the direction of buying another import -- first by making it an option when deciding which dealers to visit and then in making the final choice and closing the deal.

But this still leaves more than one in three (36%) who said they didn't seriously consider another 1988 vehicle, either domestic or import. Clearly, their decision was made earlier, and they went about shopping in a more focused way. For example, advertising messages would play a different role for them, one that is not as influential, compared to studying dealer/manufacturer materials, taking test drives, and so on.

With this in mind, who is most likely to have narrowed the choice of make or model early in their information search? Age appears to have some impact: 71% of the 25-34 year-olds seriously considered another new vehicle, while only 51% of the seniors (age 65+) did so. The decreasing likelihood that more than one vehicle was considered is probably due, in part, to an accumulation of favorable or unfavorable experiences by older buyers. Education is also closely related to the search: better-educated buyers were more likely to have considered other model options. (See Table 8)

Those who made the decision on their own were much less likely than those who had help to have seriously considered alternative models (54% vs. 72%). First-time and Experienced buyers were equally likely to have considered more than one model of new car or truck. Not surprisingly, however, the former were more likely to have considered a used vehicle (27% vs. 13%). Finally, as noted earlier, import buyers typically considered other 1988 model options more than domestic vehicle buyers did.

Factors in the Final Selection of a Vehicle

When all is said and done, what matters most in the final selection of a new car, truck or minivan? To help answer this question, new vehicle buyers were asked to evaluate fourteen specific factors, with ratings based on a five-point scale ranging from "extremely important" to "not at all important".

Table 8

Were Any Alternative Vehicles Considered?

	Other 1988 Models	A Used Vehicle
TOTAL BUYERS (% Considered)	64%	17%
SEX		
Male	64%	16%
Female	66	18
AGE		
Under 25	64%	23%
25-34	71	21
35-44	69	17
45-54	60	16
55-64	63	11
65+	51	9
INCOME		
Under $25,000	55%	25%
$25-34,999	71	17
$35-44,999	70	22
$45-59,999	69	13
$60-99,999	69	17
$100,000+	65	9
EDUCATION		
Not High School Graduate	41%	17%
High School Graduate	63	18
Some College/Technical School	64	18
College Graduate	69	16
Graduate Work/Degree	73	16
DECISION STATUS		
Had Help	72%	19%
Solo Decision	54	14
NEW VEHICLE BUYER STATUS		
First-time Buyer	65%	27%
Experienced Buyer	65	13
TYPE OF VEHICLE		
Domestic	61%	16%
Import	70	18

QUESTIONS: When you bought your new vehicle, did you seriously consider buying any other 1988 models of car, truck or mini-van?

Did you consider buying a used vehicle as an alternative to your new vehicle?

As Table 9 shows, buyers tended to rate most factors as being "extremely" or "very important" in their final selection of a vehicle. In fact, eleven of fourteen items were rated that way by at least 50% of the respondents. Topping the list is reliability: 88% said reliability was either "extremely" (54%) or "very" (34%) important in the final decision. Of course, reliability can only be established over time, so it is likely that the buyers were referring to the reputation of the vehicle for being well built, requiring minimal repairs, and so on. It is not surprising, therefore, that manufacturer's reputation comes in second in importance, with 79% saying it was either extremely or very important in their decision.

Also deemed highly important by two-thirds or more were: interior comfort and roominess, low maintenance costs, favorable product reviews, price or deal offered and attractive exterior styling. About six in ten said vehicle versatility and availability of parts and service were highly important to them. And just over half (54%) indicated that a favorable experience with the make and the overall exterior size of the vehicle were extremely or very important.

Fewer indicated that interest rates and credit terms (39%) or rebates and dealer incentives (37%) were highly important in the selection of the vehicle itself. In other words, most people didn't choose one model over another primarily because of financial incentives (unless the two vehicles were head-to-head in meeting the individual's needs). Financial factors are more likely to be reasons for choosing one dealer over another, when both have the desired make and model.

Table 9

Factors in Selection of Make/Model Purchased*

	Extremely/ Very Important	Extremely Important	Not Too/ Not at All Important
Reliability	88%	54%	3%
Manufacturer's reputation	79	44	5
Interior comfort and roominess	74	35	6
Low maintenance costs	71	39	9
Favorable product reviews	69	34	11
Price or deal offered	67	33	14
Attractive exterior styling	66	32	8
Versatility of vehicle	62	27	14
Availability of parts/service	59	26	16
Favorable experience with make	54	29	28
Overall exterior size	54	24	16
Interest rates/credit terms	39	19	39
Rebates/dealer incentives	37	16	41
Recommendation of friend/relative	28	13	52

* Those rating each factor as "very" or "somewhat important" are not shown. (Both sets of ratings can be derived by subtraction.)

QUESTION: How important were each of the following factors in deciding to buy the specific make and model of new vehicle that you did?

Finally, the item which received the lowest relative ratings was recommendation of friends and/or relatives: only 28% claimed it was extremely/ very important. This finding might seem to contradict the earlier finding that a majority (58%) of buyers had help in the decision process (37% even acknowledged getting help in the final choice of a car or truck). However, a likely explanation is that recommendations of friends and relatives can help the buyer establish a framework for making a choice, but individual (or spousal) preferences predominate in the final decision on make or model.

Demographic Differences in Selecting a Make and Model

Most buyers do not differ in the order of their top priorities -- reliability and reputation were the top two for all -- but they differ somewhat in rating other factors (see Table 10). As a group, women tended to rate every item as more important than men did. While women may have responded more definitively to the survey, it may also be the case that women are less confident about making the right choice than men simply as a result of having bought a new vehicle less often. (Women were more likely to be buying a new vehicle for the first time.)

Single women were more likely than the average buyer (78% vs. 67%) to say that the price or deal offered was highly important. This may be, in part, a function of having less disposable income to spend on a new car than most others. Single men, on the other hand, seemed to be more

Table 10

Importance of Nine Factors in Vehicle Selection*
(Percent Rating Each as "Extremely/Very Important")

	Interior Comfort & Roominess	Low Maintenance Costs	Favorable Product Reviews	Price or Deal Offered	Attractive Exterior Styling
TOTAL BUYERS	74%	71%	69%	67%	66%
SEX					
Male	73%	68%	67%	64%	66%
Female	75	75	73	73	69
AGE					
Under 25	66%	63%	65%	70%	73%
25-34	74	77	72	69	64
35-44	76	69	70	68	70
45-54	70	74	73	69	66
55-64	80	64	60	65	62
65+	75	68	69	58	67
EDUCATION					
Not High School Graduate	77%	74%	62%	64%	72%
High School Graduate	75	73	65	66	71
Some College/Technical School	74	72	68	71	67
College Graduate	73	68	74	70	65
Post Graduate Work/ Degree	72	67	73	62	61
INCOME					
Less than $25,000	70%	76%	63%	69%	59%
$25-34,999	78	75	68	71	65
$35-44,999	69	74	73	69	65
$45-59,999	73	67	70	67	67
$60-99,999	75	64	74	63	73
$100,000+	75	55	62	57	72
NEW VEHICLE BUYER STATUS					
First-time Buyer	71%	78%	69%	75%	66%
Experienced Buyer	76	69	69	66	67
TYPE OF VEHICLE					
Domestic	75%	67%	63%	68%	67%
Import	73	77	80	67	68

(Continued)

Table 10 (Continued)

Importance of Nine Factors in Vehicle Selection*
(Percent Rating Each as "Extremely/Very Important")

	Versatility of Vehicle	Availability of Parts & Service	Favorable Experience	Overall Exterior Size
TOTAL BUYERS	62%	59%	54%	54%
SEX				
Male	60%	54%	52%	50%
Female	65	67	56	58
AGE				
Under 25	57%	43%	48%	52%
25-34	62	55	50	47
35-44	63	58	53	58
45-54	63	68	56	52
55-64	57	67	58	59
65+	66	68	62	63
EDUCATION				
Not High School Graduate	62%	66%	51%	60%
High School Graduate	61	60	53	54
Some College/Technical School	68	62	53	51
College Graduate	64	58	57	55
Post Graduate Work/ Degree	54	52	51	52
INCOME				
Less than $25,000	62%	60%	50%	54%
$25-34,999	61	55	49	58
$35-44,999	65	59	58	52
$45-59,999	57	60	55	50
$60-99,999	63	61	56	54
$100,000+	60	48	50	47
NEW VEHICLE BUYER STATUS				
First-time Buyer	64%	57%	48%	55%
Experienced Buyer	61	60	55	54
TYPE OF VEHICLE				
Domestic	62%	61%	52%	56%
Import	61	55	56	50

*Note: Five other factors are not shown: the top two (reliability and manufacturer's reputation) and the bottom three. See Table 9 for the full listing.

concerned with style than other new vehicle buyers, and less concerned with other factors, such as favorable experiences, availability of parts and service, exterior size, and maintenance costs.

It certainly comes as no surprise that age affects the final choice of a vehicle. Needs change as families are founded, grow, and then disperse. As age increases certain other factors gain in importance: favorable experience with the make, availability of parts and service, overall exterior size, and interior comfort and roominess. Concurrently, older buyers are less concerned with price, interest rates and credit terms, and recommendations of friends and relatives. They have more experience to draw on in selecting a new car or truck, and more disposable income. Rebates appear to be a special case: they decrease in importance for buyers until retirement age, when once again they become a fairly highly-rated factor.

As expected, financial factors become relatively less important as buyers' income increases. These include price, interest rates/credit terms and rebates or dealer incentives. Well-to-do consumers rated style as being more important than other new vehicle buyers did.

Those with higher levels of education sought more detailed information than others. Similarly, as education increased, the importance of manufacturer's reputation and favorable product reviews also grew. However, some of the more practical aspects of the vehicle diminished in importance. Availability of parts and service, size, maintenance costs, rebates and even attractiveness seem to have had relatively less importance for the better-educated.

Not surprisingly, First-time new vehicle buyers are cost-conscious. Compared to Experienced buyers, First-timers are more concerned with price, interest rates and credit terms, rebates and dealer incentives, and anticipated maintenance costs. They're also more likely to place greater emphasis on the recommendations of others in their final selection of make and model.

Import buyers seem to be more concerned than domestic buyers with getting the "best" car or truck. These buyers rated reliability, manufacturer's reputation, favorable reviews, recommendations, and maintenance costs all more highly than did domestic buyers. On the other hand, they seemed less worried about availability of parts and service (an often-cited disadvantage of imported vehicles), overall exterior size (imports tend to be smaller than domestics), and rebates or other dealer incentives (offered less often for import cars and trucks).

Are there any differences between buyers who shopped at only one or two dealers and those who shopped around more widely? The former group of buyers were more likely to cite the importance of an earlier favorable experience with the make they chose than were those who shopped around. This suggests that they'd pretty much made up their minds in advance and were shopping for the best price. Conversely, buyers who shopped at fewer dealers were less concerned than others with favorable product reviews.

Dealer Shopping and Final Negotiations

Considering that so many factors are deemed important in the final selection of a new car or truck, one might expect buyers to cruise many dealers' showrooms, anxiously searching for the best buy of Dream Wheels. In reality, two-thirds (66%) visited three or fewer different dealers while shopping. In fact, 24% bought from the first dealer they went to, and an additional 20% shopped at only two dealers. As Table 11 shows, only 21 percent visited five or more dealer agencies.

Demographically speaking, the pattern for dealer shopping is similar to what was noted previously with respect to the duration of the information search. That is, the number of dealers visited increases with education (an average of 3.5 dealers visited by the best-educated vs. 2.4 by the least) and with income (2.8 visits for those earning under $25,000 vs. 3.6 for those with between $60,000 and $100,000), but decreases with age. On average, import buyers visited slightly more dealers (3.3) than domestic buyers (2.9). Finally, men tended to shop around more than women (averaging 3.2 vs. 2.9 visits).

As would be expected, the number of visits made to negotiate a final purchase price was lower than the total number of dealers visited (although shopping the dealers at any time certainly involved reading the sticker prices). Nearly eight in ten made only one (41%) or two (37%) trips for that purpose. (See Table 11)

Table 11

Dealer Visits, Final Price Negotiations, and Test Drives

Number	Total Dealers Visited	Visits to Negotiate Final Price	Test Drives
One	24%	41%	43%
Two	20	37	22
Three	22	15	18
Four	13	5	9
Five	9	1	8*
Six or more	12	1	...
	100%	100%	100%
AVERAGE	3.1	1.8	2.1

QUESTION: How many different dealers did you visit before buying your new vehicle?... How many times did you visit any dealer to negotiate a final purchase price?... How many 1988 vehicles did you actually test drive before you bought?

* Five or more test drives.

Consistent with the finding that most did not shop a large number of dealers, a majority of all new vehicle buyers test-drove only one (43%) or two (22%) different cars and/or trucks. Another 18% reported testing three different vehicles, and a few others (9%) tested four vehicles. Only 8% said they'd test-driven five or even more (up to nine) 1988 vehicles.

These findings suggest that a test drive is usually reserved for vehicles that a potential buyer is actively considering. In the case of those who did not consider a serious alternative, the test drive may be used to confirm the selection they'd already made. In those cases where two or more vehicles appear to meet a buyer's needs, the test-drive can be the "acid test" in the final choice.

Shopping Patterns: Timing and Distance

When buyers were asked to report on which days of the week they usually visited dealerships, most people indicated that they shopped all across the week. Fully one third (35%) claimed to have shopped seven days a week, and another 30% with a preference for weekdays or weekends actually shopped on both. In fact, only one in nine (11%) of all new vehicle buyers said they only shopped on weekends; weekday-only shopping (24%) was twice as common. (See Table 12)

Table 12

When Buyers Shopped Dealers

ALL WEEK	65%
All seven days	35
Mostly weekdays	16
Mostly weekends	14
WEEKDAYS ONLY	24
WEEKENDS ONLY	11
	100%

QUESTION: When shopping for your new vehicle on what days did you usually visit dealerships?

The propensity to shop all week varied substantially by age. While 72% of those under age 35 shopped all week, only about half of the older buyers did so. Much larger proportions of the 55-64 year olds and those aged 65+ said they had shopped only on weekdays. (See Table 13)

Table 13

When Buyers Shopped, by Age

	Age of Buyers					
	Under 25	25-34	35-44	45-54	55-64	65+
ALL WEEK	72%	73%	67%	67%	54%	43%
All seven days	42	41	39	39	24	14
Mostly weekdays	15	17	12	12	16	25
Mostly weekends	15	15	16	16	14	4
WEEKDAYS ONLY	13	17	24	17	37	52
WEEKENDS ONLY	15	10	9	16	9	5
	100%	100%	100%	100%	100%	100%

While age is the demographic variable most clearly tied to differences in shopping patterns, other characteristics show an impact as well. Although men and women generally don't differ, single men (74%) are more likely than others to report all-week shopping. There is also a tendency for all-week shopping to increase with education and income. With respect to income, those with household incomes of between $25,000 and $45,000 are the most active all-week shoppers. In addition, First-time buyers are more likely to be all-week shoppers than those who had bought a new vehicle in the past (71% vs. 63%).

How far are new vehicle buyers willing to go to find their dealer? Two-thirds (66%) said they "mostly visited conveniently located dealers," while the remainder (34%) indicated that they "traveled a wide area to visit dealers". This finding leaves open the question of how a "convenient" location was defined, since perceived convenience is a function of what is available, how competitive a market is, and how far people generally travel for other purposes (commuting, recreation, and so on). In fact, those living in the most- and least-populated communities (A and D counties) were equally likely to say they visited "conveniently located dealers" (62% in each case).

What would encourage someone to travel across a wide area? The best deal? Perhaps a dearth of specialty car dealers close to home? A preference for shopping both during the work week (and thus, theoretically, close to the work location) and to shop close to home on weekends?

In fact, one-third of all new vehicle buyers did travel widely. Among those who did, First-time buyers stand out (41%). Age is also a strong indicator: 42% of those under age 35 shopped around more widely, compared to 25% of those 65 and older. Finally, import buyers are more likely than domestic buyers (41% vs. 31%) to say they shopped widely. This may be a function of the more limited number of import vehicle dealerships in many areas, requiring buyers to travel further.

Factors in Dealer Selection

What reasons do buyers stress as important when selecting one dealer over another? New vehicle buyers rated the importance of nine selection factors on a five-point scale, ranging from "extremely important" to "not at all important." These factors included: convenient location, previous experience with the dealer, quality of the sales staff, recommendations of friends or relatives, the dealer's reputation, price or deal offered, having the desired vehicle in stock, trade-in allowance offered, and the size of the dealer's inventory.

Buyers, naturally, want the "right car at the right price", so it is not surprising that the vast majority said that price or deal offered (80%) and having the desired vehicle in stock (76%) were highly important factors in their selection of a dealer (combining ratings of "extremely" or "very" important). Nothing else came close: Price and availability form a first "tier" of importance. (See Table 14)

A second tier of importance includes such factors as sales staff quality (rated highly by 62%), the dealer's reputation (by 59%), a convenient location (by 51%) and the trade-in offered (by 46%). These factors are likely to be more important when two or more dealers can offer the same vehicle (with comparable options), without a clear price advantage among them. Of course, poor-quality sales staff, or reputation, or an inconvenient location could certainly damage the likelihood of making a sale, but buyers appear willing to put up with some inconvenience to get the best price. On its own, the trade-in allowance is probably less important, since it's only one aspect of the total deal offered to buyers. Even a great trade-in does not necessarily add up to a good deal, in the buyer's mind.

Fewer indicated that the overall size of the dealer's inventory (40%), previous experience with that dealer (34%) or recommendations from friends or relatives (29%) were highly important in selecting their dealer. These items form a third tier of importance, for reasons that are not difficult to interpret. A large inventory is not a benefit to buyers unless it includes the one sought-after vehicle, or increases the likelihood of finding one that's not widely available, or unless it helps an uncertain buyer make comparisons more efficiently. (A large inventory might suggest to buyers that a dealer who does so much business can offer a better price.)

Table 14

Factors in Dealer Selection*

	Extremely/ Very Important	Extremely Important	Not too/ Not at all Important
Price/deal offered	80%	46%	6%
Desired vehicle in stock	76	43	13
Sales staff quality	62	29	16
Dealer's reputation	59	30	19
Convenient location	51	25	23
Trade-in offered	46	26	42
Size of inventory	40	16	36
Previous experience with dealer	34	19	52
Recommendation of friends/relatives	29	14	52

* Proportions answering "very" or "somewhat important" are not shown.

QUESTION: How important were each of the following in choosing the dealership from which you finally bought your vehicle?

Previous experience with the dealer, similarly, would not be rated as important unless that dealer had the car or truck the buyer wants this time around, or gave a good deal last time, etc. Nor would recommendations of friends and relatives carry the same weight as other factors if the buyer had felt he or she could do better elsewhere.

Demographic Differences in Dealer-Selection Factors

The main factors in selecting a dealer vary in importance in ways that are similar to what was seen for vehicle-selection factors. That is, when looked at in relative rank order, men's and women's priorities typically look alike: price and availability are either first or second. However, women as a group tended to rate those and all other items as highly important more often than men did. (See Table 15)

When marital status is taken into account, married women rated location, previous experience, and the dealer's reputation as relatively more important. Single women seemed more impressed by recommendations from friends or relatives, sales staff quality, price, and inventory size. Single men, on the other hand, showed the least concern of any of the groups with all but two of the factors: having the desired vehicle in stock and recommendations from friends and relatives.

Table 15

Six Factors in Dealer Selection* by Demographic Groups (% Rated as "Extremely" or "Very" Important)

	Price/Deal Offered	Desired Vehicle in Stock	Sales Staff Quality	Dealer's Reputation	Convenient Location	Trade-in Allowance Offered
SEX						
Male	78%	73%	56%	54%	48%	44%
Female	83	80	70	65	53	47
MARITAL STATUS						
Married Men	80%	73%	58%	54%	48%	47%
Married Women	82	80	66	67	55	47
Single Men	74	76	45	48	43	33
Single Women	86	81	71	64	49	43
AGE						
Under 25	82%	77%	60%	57%	46%	38%
25-34	80	76	58	56	41	43
35-44	79	73	56	51	53	45
45-54	82	78	62	63	57	45
55-64	80	76	68	64	50	50
65+	79	79	78	76	60	58
INCOME						
Under $25,000	82%	80%	65%	64%	49%	48%
$25-34,999	81	74	62	52	46	56
$35-44,999	79	72	63	62	48	47
$45-59,999	80	80	64	57	54	41
$60-99,999	77	75	50	55	51	36
$100,000 or more	72	67	53	50	43	34
NEW VEHICLE BUYER STATUS						
First-time Buyer	83%	82%	63%	60%	48%	40%
Experienced Buyer	80	74	62	59	51	48
TYPE OF VEHICLE						
Domestic	81%	75%	64%	63%	55%	50%
Import	80	77	58	54	43	39

* Note: Three other factors are not shown; see Table 14 for the full listing.

Priorities clearly change with age and experience. Older buyers rated dealer location, previous experience with the dealer, trade-in offered, sales staff quality, and dealer reputation more highly than did younger buyers. In general, older buyers are simply less interested in shopping around extensively. (Note that this finding with respect to dealer location squares with earlier findings that older buyers were more likely to "shop conveniently located dealers" and to shop more quickly.) Younger buyers, on the other hand, rated recommendations from friends and relatives more highly, probably because of their relative lack of experience. But age made no difference when it came to price and availability: ratings for those variables were consistently high across the board.

As might be expected, those with the largest incomes were somewhat less concerned with price and availability than were other new vehicle buyers, although those factors emerged at the top of the ratings given by the well-to-do. They also tended to be somewhat less concerned with sales staff quality and trade-in values.

The generally greater availability of domestic vehicles, along with their lower prices currently within the same broad category of vehicle, may largely account for the differences between domestic and import buyers in their dealer-selection ratings. Domestic buyers rated dealer location, previous experience with the dealer, the dealer's reputation, staff quality, and trade-in offered more highly than import buyers did. The message seems to be that availability and price weigh more heavily than the dealer in choosing a deal on import vehicles.

Dealer Offerings and Satisfaction with the Dealer

Did they buy from dealers' inventories or did they special-order their vehicles? Consistent with the priority given to availability in selecting a dealer, seven in ten (71%) said they bought their new vehicle from dealer inventory "because they had what I wanted". Another 16% said they bought from inventory to avoid the wait for a special order. Fewer (9%) indicated that they special-ordered their new car or truck "to get the right combination of options" or because "the dealer did not have your model in stock" (6%).

Two-thirds (64%) said the dealer they bought from carried only one manufacturer's line of cars and trucks (such as only Fords or only Toyotas). Not surprisingly, import buyers were more likely than domestic buyers to have bought from a dealer who carried multiple lines (40% vs. 34%). Those dealers also differed in the origin of the vehicles they offered: 42% carried only domestic models, 26% only imports, and 32% carried both domestic and imports.

Now that a dealer was finally selected and the deal consummated, how do buyers evaluate that dealer on the basics? For the most part, dealers got a good report card. Nearly all new vehicle buyers (91%) said their dealer "adequately explained the vehicle features, and the operations of its controls," and almost as many (88%) said he/she "adequately explained the details of warranty coverage." Eighty-five percent noted that extended warranty coverage, where applicable, was also satisfactorily explained.

Fewer (67%) indicated that the dealer contacted them after the sale was completed, although this percentage still reflects good follow-up. As the survey was conducted just a few months after the purchase, it may be that this finding underestimates the proportion of dealers who eventually follow up with their customers. Finally, only 44% said the dealer introduced him/her to someone in the service department.

Whatever Happened to the Old Clunker?

Three-quarters of new vehicle buyers disposed of an older vehicle when they made their most recent purchase. Half (53%) traded in that other car or truck, while 22% said they sold it on their own. For the latter group of entrepreneurs, announcements of availability were primarily made through personal networking: 72% indicated that they "sent out notices, talked to friends, etc." Thirty-four percent placed an ad in their local daily newspaper, and a few (7%) used an auto trader for that purpose. Some used more than one medium.

III. Advertising and the Search for Information

New vehicle buyers, like consumers of other "big ticket" items, utilize a variety of resources to determine what to buy and where to buy it. These resources include spouses, friends and relatives -- 58% involved others when shopping and buying -- the dealer or sales staff, past experiences, test drives, and, of course, the mass media. Compared to tangible experiences -- talking with a friend or kicking the tires -- the influence of the media is more subtle and less obvious to consumers. It often involves selective attention to articles or advertisements about vehicles, in particular about a model they may have had their eyes on.

In order to assess the role played by media advertising, new vehicle buyers were first asked whether or not they had gotten any information from seven different sources. These sources included magazine advertising, newspaper advertising, radio advertising, TV advertising, auto traders, outdoor advertising, and dealers'/manufacturers' printed materials, such as brochures or sales pieces. (See Table 16)

The only source mentioned by a majority of new vehicle buyers (cited by 62%) was dealers'/manufacturers' print materials. Technically, of course, they do not qualify as a mass medium, as they usually become available to consumers only during a visit to the dealer. However, since it can be assumed that practically everyone scans brochures for vehicles they plan to buy at some point, this level of claimed use provides a benchmark for interpreting the relative position of media advertising.

Newspaper ads were the most frequently cited (by 43%) media information source. Somewhat fewer said they obtained any information from magazine ads (37%) or television ads (35%). These three appear to be the primary sources; less than two in ten reported using auto traders (17%), or radio ads (15%), and only one in ten new vehicle buyers got information from outdoor advertising (10%).

Why might these numbers seem to be low? As noted earlier, consumers often aren't aware that they're getting information from advertising; many people might be reluctant to admit it, even if they did. In addition, for many people, "getting information" may imply an active search rather than exposure to information from ads. Finally, it is difficult for some people to remember exactly what they did, once the buying process is over. Thus, these findings probably underestimate the actual value of these media as sources to buyers, although their relative order of value (as the benchmark finding that places dealers' print materials on top attests) seems to be reasonably reliable.

Demographic Differences in Media Use

As expected, the propensity to use a particular ad medium for information about new vehicles varies by demographic characteristics. Table 16 shows differences in usage for dealer brochures, newspaper ads, magazine ads, TV ads, auto traders, radio ads, and outdoor advertising.

These data provide some support for the often-cited hypothesis that men are more print-oriented than women. Although the differences are not large, men reported higher levels of use than women for magazine ads (42% vs. 31%), auto traders (20% vs. 14%) and dealer/manufacturer print materials (65% vs. 58%). The one exception was newspaper ads, which men and women were equally likely to report having used. And it is married women who are less likely to use print ad media (dealer brochures, newspaper ads, and magazine ads) as sources of information. In contrast, single women show the highest rate of newspaper use of all groups.

When age groups are examined in relation to media use, two factors appear to be important. First, there is a tendency for mentions of any specific medium to decrease as age increases (especially among the 65+ group). This makes sense, since older buyers, having accumulated experience and refined their tastes, are less likely to rely on the media. Concurrent with this observation is the finding that the range of media usage by age differs substantially for print and broadcast ad media. For example, while newspaper advertising use remains consistently high until about age 55, then declines slightly, television ad use starts out high (47% among those under age 25), then diminishes rapidly (to 25% among the 65+ group).

The links between education and media use can be summed up simply: education is linked with increased use of print media. As Table 16 shows, those with some college are substantially more likely to report using all three print ad media: dealer brochures, newspapers, and magazines. They were also slightly more likely to report using auto traders than those

Table 16

Who Uses Different Ad Media?

	Dealer Brochures	Newspaper Ads	Magazine Ads	TV Ads	Auto Traders	Radio Ads	Out-Door Ads
TOTAL BUYERS	62%	43%	37%	35%	17%	15%	10%
SEX							
Male	65%	43%	42%	36%	20%	13%	10%
Female	58	43	31	34	14	17	11
MARITAL STATUS							
Married Men	66%	42%	41%	35%	20%	11%	9%
Married Women	56	38	30	33	16	17	14
Single Men	63	45	42	41	20	18	12
Single Women	65	49	36	38	14	19	11
Divorced/Sep/Wid	53	46	34	31	12	19	5
AGE							
Under 25	65%	44%	42%	47%	17%	24%	11%
25-34	61	47	39	37	19	19	13
35-44	64	46	42	32	16	12	9
45-54	68	43	35	34	20	12	11
55-64	60	36	33	33	16	8	8
65+	50	29	27	25	14	5	2
EDUCATION							
Not HS Graduate	48%	29%	19%	23%	17%	8%	11%
HS Graduate	55	38	34	39	15	15	11
Some College/Tech	62	41	34	37	13	16	10
College Graduate	64	50	45	37	21	18	12
Grad Work/Degree	72	49	44	30	23	11	7
INCOME							
Less than $25,000	54%	44%	31%	45%	14%	21%	14%
$25-34,999	53	45	33	29	15	15	6
$35-44,999	66	43	40	34	18	15	7
$45-59,999	62	38	38	38	21	13	15
$60-99,999	67	45	43	31	17	9	12
$100,000+	70	39	41	23	16	10	4
NEW VEHICLE BUYER STATUS							
First-time Buyer	57%	49%	36%	44%	18%	22%	16%
Experienced Buyer	64	41	38	32	17	12	8
TYPE OF VEHICLE							
Domestic	64%	41%	35%	34%	16%	13%	9%
Import	59	46	42	38	20	17	12
DECISION STATUS							
Solo Decision	60%	41%	33%	31%	16%	12%	11%
Had Help	64	44	41	38	19	16	9

with less education. By contrast, mentions of TV, radio, and outdoor advertising appear to be lower than average among those at both ends of the educational attainment ladder, but average or above average for those with a high school diploma or college degree.

The patterns of media use based on income are different from those associated with education or age. Use of dealer brochures increases dramatically with income, while use of newspapers remains fairly constant; magazine ad use is most prevalent among those with mid-level incomes. Similar to the age-usage patterns, however, use of the broadcast ad media declines sharply as income increases.

Which Advertising Media Were Most Helpful?

After new vehicle buyers reported on their use of the seven different ad media as information sources, they were asked which one ad medium was most helpful in making two critical decisions: "which dealers to visit" and "which make and model car or truck to buy." These are the types of questions consumers often have difficulty answering; nearly half of the buyers were unwilling to make a choice among the media. But for the rest, when deciding which dealers to visit, newspaper advertising is clearly the preferred medium. Over half (53%) mentioned newspaper ads, compared to only 21% naming television as most helpful. Only a few named any other medium. (See Table 17)

Newspaper advertising is the preferred medium in choosing among dealers for all demographic groups, although its margin of superiority varies somewhat. For example, while 59% of college graduates selected newspaper ads as most helpful, 48% of those with a high school degree or less education did so. Similarly, single men were somewhat less likely than others to select newspaper ads as most helpful (42%) and more likely to select television, magazines, or other print media. Men and women did not differ, however, as 53% in both groups said newspaper ads were the most helpful of all ad media.

Table 17

Most Helpful Ad Medium

	Dealer Visits	Make/Model Selection
Newspaper Advertising	53%	23%
Television Advertising	21	23
*Other Print Media Advertising	12	21
Magazine Advertising	7	31
Radio Advertising	7	2
	100%	100%
Base (N)	(998)	(1,065)

* Includes dealer brochures, manufacturers' brochures, catalogs and auto traders.

QUESTION: Which one type of advertising was most helpful in deciding...
Which dealers to visit? Which make and model to buy?

The role of the ad media is less well defined for make and model selection than for dealer selection. No single ad medium emerged clearly as the most helpful one. Magazines were cited most often (by 31%), followed closely by newspapers (23%), television (23%), and other print media (21%). The one ad medium that does not appear to have much influence is radio: only 2% said it was the most helpful medium in deciding which make or model to buy.

Men were more likely than women to select magazine ads as most helpful (35% vs. 23%), perhaps because of their greater interest in automotive magazines. Women's choices, on the other hand, were much more evenly distributed: newspapers (25%), magazines (23%), television (25%) and other print materials (24%) all received equal mention as the most helpful ad medium in choosing a make and model.

New vehicle buyers with a college degree were nearly twice as likely to select magazine ads, compared to those with a high school diploma or less education (40% vs. 24%). Similarly, 37% of those with at least $60,000 annual household income chose magazines as most helpful in selecting a make and model, compared to 25% of those with household incomes of less than $35,000.

How Often Did They Read the Classifieds?

When they were actively shopping, the majority (59%) of new vehicle buyers read the automotive classifieds in their local daily newspaper regularly (at least once a week). Nearly one-fifth (17%) reported daily classified reading, and another 26% said they read "several times per week." The remainder (16%) looked at the classifieds once a week. Those who reported reading classified ads less often than that tended to be very infrequent readers. Thirty-four percent said they read the classifieds less than once a month. (See Table 18)

Table 18

Frequency of Classified Ad Reading When Shopping

	Total Buyers
AT LEAST ONCE A WEEK	59%
Everyday	17
Several times per week	26
Once a week	16
LESS THAN ONCE A WEEK	41%
Several times per month	4
Once a month	3
Less often than monthly	34
Base	(1,622)

QUESTION: While you were actively shopping for your new vehicle how frequently did you look at the automotive classified section of the newspaper?

Men are more likely than women to report regular classified reading (63% vs. 54% read at least once a week). Married men are the most frequent readers: 65% said they read the automotive classifieds at least once a week and 21% were daily readers. Other than sex, the only significant demographic difference among shoppers was age-related. While three-fifths (61%) of those under age 55 reported reading the classifieds at least once a week, one half (52%) of age 55+ consumers did so. As older buyers are more likely to have chosen a vehicle in advance, and to rate previous experience with a dealer highly, it is not surprising that they tend to rely on the classifieds a little less than others do.

How Helpful ARE the Classified Ads?

New vehicle buyers rated each of eight aspects of their daily paper's automotive classifieds as being "very helpful", "somewhat helpful" or "not helpful" to them while they were shopping. As Table 19 shows, newspaper classified ads got their highest marks as a tool for convenient comparison-shopping. Two-thirds said the classified ads were "very" or "somewhat" helpful in "comparing the selection of vehicles offered by various dealers." The majority also found the classifieds helpful for making price comparisons (61%), comparing dealer locations (59%), comparing incentives offered by different dealers (56%), and estimating their old car's current trade-in value (56%).

Newspaper classified got slightly lower marks for comparing other specifics, such as options packages (49% rated it as helpful), and availability of specific vehicles and options at different dealers (47% rated it as helpful). These findings reflect an inability to fit all those details into classified ads for more than a few cars/trucks on a routine basis. The lowest ratings were for comparing finance terms offered by dealers (e.g., down payments, monthly payments), for which 40% found newspaper ads "very" or "somewhat" helpful. As these items change quickly and are often considered part of the bargaining process, it's not surprising that classified ads are not rated as highly.

Table 19

Helpfulness of Newspaper Automotive Classified*

	Very/Somewhat Helpful	Very Helpful
Comparing the selection of vehicles offered by various dealers	67%	22%
Comparing prices for the same model offered by various dealers	61	25
Comparing dealer locations	59	23
Comparing incentives (rebates, discounts)	56	19
Estimating current value (trade-in) of vehicles you now own	56	18
Comparing options on specific vehicles offered by various dealers	49	14
Comparing availability of specific vehicles/options at various dealers	47	13
Comparing finance terms (down payments, monthly payments, etc.	40	12

* Proportions answering "not helpful" are not shown.

QUESTION: How helpful did you find the automotive classified ads in your local daily newspaper for...

What Builds Interest in Automotive Classified?

What features of an automotive classified ad are most and least likely to attract readers' attention? To examine this important marketing question, survey respondents were asked to rate ten ad features or copy points in terms of their importance in attracting attention to specific classified ads when they were shopping for a new vehicle. The ratings utilized a five-point scale, with "extremely important" and "not at all important" as its end points.

When interpreting the findings, it is well to remember the difficulty people often have in consciously identifying what it is that draws them to ads in general. New vehicle buyers might be expected to forget how they went about looking for information in ads (now that the buying process is over), or to be selective in such recall (remembering those things that tend to reinforce their buying decision). Moreover, one can expect their priorities in ad noting and reading to have changed somewhat as their information search progressed.

As Table 20 shows, new vehicle buyers want solid information to help them compare the "deals" they're likely to get from different dealers. It should come as no surprise, then, that price information was the most highly rated of all: six in ten (58%) called price information "extremely" or "very" important in attracting their attention to an ad. But price by itself does not make a deal. Consumers also wanted to know about dealer and/or manufacturer's warranties (highly rated by 54%) and the specific makes and models a dealer carried (highly rated by 51%).

Table 20

Key Ad Copy Points

	Percent Rating as Extremely/ Very Important:		
	Total	Men	Women
Price information	58%	55%	67%
Manufacturer/dealer warranties	54	50	60
Specific make/model in ad	51	48	55
Particular options	44	42	48
Rebate/incentive	36	33	39
Monthly payments	33	24	45
Pictures of vehicles	31	28	37
Dealer financing	30	23	41
Specific dealer name/logo	23	20	28
Limited time sale	23	19	29

QUESTION: In attracting your attention to newspaper car or truck ads, how important were the features listed below?

A second tier of factors that build attention to ads is made up of a number of specific features of the potential deal. Financial considerations are predominant here, with about a third saying rebates/incentives (36%), monthly payment information (33%) and dealer financing (30%) are highly important as attention-getters. Another second-tier element is specific options mentioned in the ad (such as a tape deck or options package at no extra charge), which was rated highly by 44%. These aspects of the deal are often negotiated directly with the dealer, which in part explains their lower relative ratings. Pictures of vehicles in ads also fit here, though their reproduction quality and variety might substantially affect prospective buyers' ratings.

The items which received the lowest ratings for attracting reader attention were the dealer's name and logo, and information pertaining to a limited-time sale: each was rated highly by only 23%. That these ad characteristics are "third tier" considerations is not surprising when seen from the buyers' perspective. Initially, selection of a dealer is most heavily influenced by their desire to find one with the "right car at the right price". Once a buyer sees affordable price information for the desired vehicle, the dealer's identity then becomes a salient issue.

Similarly, while a limited-time sale implies that the price will be favorable, only quoted price information will reveal whether the sale is a "good deal" or not, in the prospective buyer's mind. Further, because of repetition, consumers probably view such "limited-time-only" sale claims with a jaundiced eye, unless price information supports the claims. When an ad does offer exceptionally good prices for the "right" vehicle for a limited time only, potential car and truck buyers are more likely to take notice and act quickly.

Demographic Differences in Advertising Appeal

As was true of factors in dealer and vehicle selection, women tended to rate all individual ad elements as being more important in building attention than men did. Again, this may be a function of women's greater uncertainty about the whole buying process, making each piece of information all the more important. The very substantial sex differences with respect to the importance of monthly payments (45% vs. 24%) and dealer financing (41% vs. 23%) information in an ad clearly reflect women's greater financial concerns. As we saw earlier, women generally have less money to spend, and, in fact, spent less than men did for a new vehicle. In a related vein, First-time buyers are much more concerned with financial ad copy points than Experienced buyers are.

With increasing age, education, and income, ratings of the importance of financial ad elements tend to decrease. For example, while 50% of those under age 25 rated monthly payment information highly, only 13% of those aged 55-64 did so. These findings are expected, since age and income (and, to a degree, education) tend to be interrelated.

Two other differences should be noted. First, those who shopped at only one or two dealers were likely to rate the dealer's name and logo more highly than those who shopped four or more dealers (34% vs. 17%). This suggests that some new vehicle buyers shop on the basis of name recognition, though it may also reflect self-reinforcement, (i.e., one dealer carried the vehicle the buyer wanted, so it was that dealer's ad that was most clearly recalled).

Second, while ad ratings given by domestic and import buyers were similar, domestic buyers rated options information (47% vs. 39%) and rebate information (41% vs. 26%) more highly. This may be due to differences in dealers' and manufacturers' policies. Domestic buyers may have become more attuned than import buyers to options and rebate offerings in new vehicle advertising in recent years.

Newspaper Reading and Interest in Automotive Topics

New vehicle buyers show above-average involvement with newspapers. More than seven in ten (72%) have a daily or Sunday newspaper delivered to their home. Nearly six in ten (58%) have a weekday-and-Sunday subscription. Most are frequent readers as well: two-thirds (66%) report reading their local daily paper every day or almost every day, and 74% read at least three of the four most recent Sunday editions.

Even though though they had recently purchased a new car or truck, a sizeable proportion (44%) of all new vehicle buyers said they still read or browse the automotive classified ads. Those who do tend to do so with some regularity: 65% read the classified ads at least once a week, and 10% still read the classifieds daily.

When asked why they continue to read, three-fourths (74%) of the current classified ad browsers said they like to "keep current on car values," and 38% said they "just like to read about cars." A minority (14%) did so because they're looking for another vehicle to buy, which opens up the possibility of dealer ads that build on recent purchasing experiences in the form of "satisfied customer" testimonials.

Two-thirds (67%) of all new vehicle buyers said the newspaper they usually read carries a special automotive section featuring new models at various times during the year. Interest in these sections, when available, is strong: 86% of the buyers reported reading them at some time or another. Fully 35% read the sections whenever they appear and 34% read them at least "occasionally." Another 17% said they read special automotive sections only when they're in the market for a new vehicle.

IV. Ten Market Segments: Sales Information and Buyer Profiles

This chapter will focus on the ten broad market segments included in the study: subcompacts, compacts, small specialty vehicles, midsize and fullsize cars, luxury cars, sport specialty cars, compact pickups, compact vans, and compact sport utility vehicles.[1] Each segment will be profiled in terms of the variety of makes and models included, its market share and median price, and various buyer characteristics. Because the volume of information on each segment is so large, only characteristics that differentiate each from those of the "average" new vehicle buyer will be highlighted. (Detailed data on each buyer segment are shown in Tables 21-29 at the end of this chapter.)

A. Subcompacts

Subcompacts include such models as the Toyota Corolla, Ford Escort, Mazda 323, Nissan Sentra, and the Honda Civic. This segment is the least expensive of the seven car segments. The median price paid for cars in this class was $9,349, compared to $12,721 for all vehicles bought. It is also the largest of the segments studied, accounting for 22.5% of all sales in January 1988.

Over half (55%) of all new subcompacts are purchased by women. This is the only segment for which they are in the majority (women bought 40%

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[1] A complete listing of the specific makes and models included in each segment can be found in Appendix Table A.2.

of all new vehicles). Compared to new vehicle buyers as a whole, subcompact buyers are more likely to be young (76% were under age 45), single (30% vs. 19%), and to have slightly smaller household incomes (48% earned under $35,000, vs. 38% for all buyers).

Nearly half (47%) of all new subcompact buyers had never bought a new vehicle in the past, substantially greater than in any other segment. The lower degree of experience of many subcompact buyers is further reflected in the above-average involvement of spouses, friends, or relatives in both their vehicle and dealer selection.

The number one reason given for purchasing a new subcompact car was the need to replace an older vehicle (rated as "extremely" or "very" important" by 76%), rather than the desire for a new vehicle per se (the prime reason for all other buyer groups). Further, subcompact buyers rated financial considerations in vehicle selection (price, maintenance costs, interest rates/credit terms) as more important than most other buyers, and comfort and style factors (interior comfort and roominess, attractive exterior styling, overall exterior size) as less important. Subcompact buyers also demonstrated greater interest in seeing financial information (price, monthly payments, dealer financing) in newspaper classified ads than did the average new vehicle buyer.

B. Small Specialty Vehicles

Small specialty cars include the Chevrolet Camaro, Toyota Celica, Honda Prelude, Toyota MR2, and Dodge Daytona, to name a few. This segment, with its "sporty" appeal, is much smaller than the subcompact market (with 8.8% of total sales), and is typically more expensive, with a median price of $13,271.

Not surprisingly, sport specialty car buyers are similar to subcompact buyers in many respects. They're predominantly young (76% under 45 years of age), and less likely than the average buyer to be married. Men and women are equally likely to buy this category of specialty car. The main difference between small specialty car buyers and subcompact buyers is income: the former have more of it. More than half (54%) earn at least $45,000 annually.

Compared to new vehicle buyers as a whole, small specialty car buyers tend to be more "active", with above-average participation in exercise/active sports, pleasure driving, trips to the beach or lake, and boating or sailing. They're also more likely to go to the movies on a regular basis, and to prefer Top 40 or Adult Rock music stations.

Small specialty car buyers appear to want a sporty new car that expresses their youthful good taste. Attractive exterior styling was the number one consideration in vehicle selection, rated as highly important by 90%. They were relatively less concerned with versatility, size, comfort, and maintenance costs. These buyers were also more likely than the average buyer to cite automotive magazine advertising as a useful information source.

C. Compacts

Cars classified as compacts include the Chevrolet Cavalier, Buick Skyhawk, Pontiac Sunbird, Honda Accord, and Mazda 626. These are mid-priced cars, with a median price paid of $12,487, and accounted for 16.0% of total January 1988 sales.

The demographic and lifestyle profiles of compact buyers look quite similar to the average profile of all new vehicle buyers, with one exception: education. Almost half (48%) of all compact buyers have at least a college degree (and 27% have graduate credits or a graduate degree), compared to 39% of all new vehicle buyers. In fact, compact buyers' education levels are higher than those in all other buyer segments, except for buyers of luxury cars and compact vans.

When selecting a vehicle to buy, compact buyers are relatively more likely to give strong weight to personal experience and favorable reviews, and less likely to be swayed by a rebate or other dealer incentive. Compact buyers also rated a dealer's name and logo as relatively more important in attracting their attention to a newspaper classified ad.

D. Midsize Cars

The midsize car segment includes such diverse cars as the Pontiac Grand Am, Chevrolet Celebrity, Ford Taurus, Audi 80, Acura Legend, Buick LeSabre and the Alfa Romeo Milano. The diversity of this group results from combining four subsegments of the midsize category into a single group, which accounted for 18% of total January 1988 sales. As a result, a few important subgroup differences have been obscured. The median price paid for a midsize car was $14,266.

As a group, midsize buyers tend to be older than the average new vehicle buyer, although purchasers were fairly evenly distributed by age. The sex ratio is similar (63% male vs. 60% for all buyers), but midsize buyers were slightly more likely to be married and to have higher incomes. They are one of three buyer segments most likely to favor talk and all-news radio formats (the other two are full-size and luxury car buyers). Midsize car buyers appear to be mainstream Americans.

They are more likely than the average buyer to consider dealer rebates or incentives highly important to a good deal, not only for attracting their attention to a classified ad but also in selecting a dealer. Conversely, they were less interested than most in seeing monthly payment information in an ad. Midsize buyers were also less concerned than others with their new car's versatility as a factor in their buying decision.

E. Fullsize Cars

The big cars of the automotive market include the Buick Electra, Mercury Grand Marquis, Chrysler Fifth Avenue, and the Olds Ninety-eight. The fullsize segment has declined dramatically over the past decade, and now accounts for only 4.4% of total sales. However, the price tag is still big, with a median of $17,382.

The fullsize car is much more likely than any other car to be an older man's choice. Male purchasers outnumber females by a nearly three-to-one margin (73% vs. 27%), and three-fourths of all fullsize buyers are over age 55 (46% are past retirement age). Fullsize car buyers generally have less education (though a professional element of 20% reported graduate work), but their income is not markedly greater than the average car buyer.

Consistent with their demographic profile, fullsize buyers are more likely than others to enjoy hunting or fishing, boating or sailing, pleasure drives, gardening, hobbies and card games. They're less likely to be found at the movies or reading a book. Their radio preferences run to country-western (46%), classical (29%), all news (29%) and talk (24%) formats.

Fullsize buyers want a lot from their car. Interior comfort and roominess was their number one criterion, but they also gave above-average consideration to attractive styling, size, availability of parts and service, and past experience when choosing their new car. By contrast, interest rates/credit terms, and recommendations from others were less important to them. They are much less likely to have bought because they needed to replace or add a vehicle. Perhaps because of their age, experience with car buying, and well-developed preferences, fullsize car buyers reported below-average use of any advertising medium as an information source.

F. Luxury Cars

This top-line segment includes the Lincoln Town Car, Volvo 760, Jaguar XJ-6, BMW 5 series, and many Cadillac and Mercedes-Benz models. These cars accounted for only 3.8% of total January 1988 sales, but had the highest median price paid: $23,760.

Compared to the average car buyer, luxury buyers are predominantly male (although women bought 32% of all luxury cars), married (only 9% were single), and well educated (47% have at least a college degree). They also tend to be older: 80% are at least 45 years old, and 31% are age 65 or older. And, of course, luxury buyers have more money, fully two-thirds (66%) reporting incomes of $60,000 or more.

As expected, luxury car buyers rate interior roominess and comfort, styling, size, and past experience as more important in their choice of make and model than did the average buyer. The only reason for buying when they did that was rated highly important by a majority was their desire for a new vehicle. That money is less of an issue for these car buyers can be seen in their relative lack of interest in price, interest rates, and rebates/incentives as factors in advertising appeal.

G. Sport Specialty Vehicles

Sport Specialty vehicles are an exclusive group of high performance ("hot") cars: the Mazda RX-7, Porsche 911 and 944, Toyota Supra, Nissan 300ZX, and the Chevrolet Corvette. This group of vehicles comprises a very small segment (.8%) of the total market, but has a median price comparable to that of the luxury segment ($23,018).

The main differences between the sport specialty and luxury car buyers are that the former are younger (76% under age 45) and less likely to be married (31% single). Similar to the luxury buyer, the sport specialty buyer is usually male, well educated, and with a substantial yearly income: 79% earn $45,000 or more.

Unlike the luxury car buyer, however, the sport specialty buyer seems to have a stronger interest in active sports, pleasure driving, spectator sports, trips to the beach or lake, boating or sailing, movies, plays or concerts and eating out. The youthful interests of the sport specialty buyer are also reflected in a preference for Top 40 and Adult Rock radio stations.

For virtually all (95%), attractive styling was crucial in selecting their make and model, making it the number one criterion among sport specialty buyers. (Ratings for reliability and manufacturer's reputation were on a par with the average buyer.) This buyer segment, understandably, gave much lower ratings to interior comfort and roominess, maintenance costs, price or deal, versatility, size, interest rates, and rebates/incentives. As was true of luxury car buyers, they did not purchase their new car to replace or add a vehicle. The hot car's intrinsic appeal was the prime reason for buying it when they did.

Magazine advertising was important for sport specialty buyers: 61% (vs. 31% of average buyers) said magazine ads were the most helpful of all in their choice of a car. But newspaper classified ads were rated as most helpful in their choice of a dealer twice as often as were magazine ads.

H. Compact Pickup Trucks

Compact pickups include the Dodge Dakota, Chevrolet S10, Jeep Comanche, Ford Ranger, and Isuzu Pickup, as well as pickups by Toyota, Nissan, Mitsubishi and Mazda. This growing segment of the automotive market accounted for 12.7% of total sales in January 1988. The median price paid was $10,562, second only to subcompacts at the low end.

Men were four times more likely than women to buy a compact pickup. These buyers are a young group -- two-thirds (66%) are less than 45 years of age -- with below average education (only 21% have a college degree), or income (53% make less than $35,000 yearly). However, they are also an active group, with above-average participation in pleasure driving, beach trips, hunting or fishing, camping/hiking, and card games. Their top radio stations are Country-western (54%) and Adult Rock (40%).

Compact pickup buyers are more likely to say they're adding a vehicle and less likely to be replacing an older car or truck. Financial concerns were evident in selecting a make and model but not in choosing a dealer or in rating newspaper classified ad features. Compact pickup buyers were likely to cite television ads relatively more often as a source of information.

But they cited newspaper advertising as most helpful in deciding which dealers to visit almost twice as often as TV (49% vs. 27%).

I. Compact Vans

These rising stars of the 'eighties include the Plymouth Voyager, Chevrolet Aerostar, Dodge Caravan, and the Volkswagen Vanagon. Compact vans accounted for 5.8% of total sales in January 1988, and had a median price of $15,971.

Nearly all (91%) compact van purchasers are married and most (70%) are concentrated in the 25-44 age group. The need for a wagon type of vehicle is suggested by their larger household size (3.8 compared to 2.9 for all buyers). They show high educational attainments (75% with at least some college, 30% with advanced work or degrees). Two-thirds (67%) earn between $35,000 and $100,000 annually.

Not surprisingly, compact van buyers put a higher value on comfort/roominess, versatility, and size and a lower value on attractive styling when making their purchase. They're not as concerned as others with the financial aspects of the purchase. Their motto seems to be: "Buy the one that does the job best." Compact van buyers also placed less emphasis on any specific factor in choosing a dealer, in part as a function of the more limited sales outlets for such vehicles and its relative newness as a segment.

Compact van purchasers were less likely than the average buyer to rate newspaper classified advertising highly, though their use of newspapers was on a par with others. They tended to use television and radio ads less than others, however. Magazine ads, brochures, and auto traders were considered the most helpful media in selecting their van, but newspaper ads were chosen as most helpful in choosing a dealer more than three times as often as any other ad medium.

J. Compact Sport Utility Vehicles

Jeep Cherokee, the Bronco II, the Chevrolet Blazer, the Suzuki Samurai, the Range Rover and the Toyota Land Cruiser are all classified as compact sport utility vehicles. This is another growth segment, which accounted for 7.2% of total January 1988 sales. The median price was $15,728.

The sport utility vehicle buyer is similar to the average new vehicle buyer in most respects. Two-thirds are male and married, and their income and education show fairly even distributions. However, these buyers are more likely than others to fall into the 35-44 age group, and fully 64% are between 25 and 44 years of age.

Similar to the other specialty vehicle buyers, compact sport utility buyers demonstrate above-average interest in active, outdoor pursuits (exercise, driving, water sports, camping). They are similar to compact van buyers in their greater involvement with the home (odd jobs/painting) and with gardening. Like other youthful car-buying groups, compact sport utility buyers tend to prefer rock or Top 40 radio stations.

Compact sport utility buyers sought a reliable, versatile vehicle. They were less concerned than others with almost every other aspect of the purchase decision (e.g., financial incentives/costs, the manufacturer's reputation, availability of parts and service, recommendations, sales staff, trade-ins, and warranties). They were also less likely than most to have bought for the purpose of replacing a vehicle or adding one to the family collection.

While their overall use of advertising media is similar to that of others, compact sport utility buyers are more likely to have relied on television ads for information on makes and models. But they cited newspaper ads four times more often than TV (57% vs. 14%) as the most helpful medium in choosing a dealer.

Table 21

New Vehicle Buyer Segments: Demographic Profiles

	Total Buyers	Subcompact	Small Specialty	Compact	Mid-Size	Full-Size	Luxury	Sport Specialty	Compact Pick-Up	Compact Van	Compact Sport Utility
SEX											
Male	60%	45%	51%	57%	63%	73%	68%	72%	80%	67%	67%
Female	40	55	49	43	37	27	32	28	20	33	33
MARITAL STATUS											
Married	67%	54%	52%	69%	75%	84%	78%	56%	70%	91%	67%
Single	19	30	31	16	14	2	9	31	19	2	22
Divorced/Sep./Widowed	14	16	17	15	11	14	13	13	11	7	11
AGE											
Under 25	11%	18%	22%	10%	6%	0%	0%	10%	15%	1%	10%
25-34	29	45	28	28	19	5	5	28	32	29	33
35-44	21	13	26	22	22	7	15	38	19	41	31
45-54	16	17	15	14	14	13	26	16	16	16	14
55-64	11	4	6	12	18	29	23	5	12	8	9
65+	12	3	3	14	21	46	31	3	6	5	3
EDUCATION											
Not High School Graduate	6%	5%	3%	5%	6%	12%	10%	2%	7%	5%	6%
High School Graduate	28	27	24	24	27	38	23	16	38	20	24
Some College/Tech School	27	27	31	23	28	23	20	25	34	27	30
College Graduate	17	20	16	21	16	7	18	23	10	18	22
Graduate Work/Degree	22	21	26	27	23	20	29	34	11	30	18
INCOME											
Less than $25,000	21%	35%	15%	16%	16%	18%	4%	5%	28%	10%	11%
$25-34,999	17	13	16	22	16	21	7	8	25	13	18
$35-44,999	18	18	15	17	18	17	9	8	20	21	17
$45-59,999	17	16	22	17	25	15	14	17	8	25	22
$60-99,999	19	16	25	22	17	20	31	33	13	21	20
$100,000+	8	2	7	6	8	9	35	29	6	10	12

Table 22

New Vehicle Buyer Segments: Elements of the Purchasing Process

	Total Buyers	Subcompact	Small Specialty	Compact	Mid-Size	Full-Size	Luxury	Sport Specialty	Compact Pick-Up	Compact Van	Compact Sport Utility
CONSIDERED ANOTHER 1988 MODEL VEHICLE	64%	68%	67%	71%	66%	50%	48%	36%	58%	64%	62%
Car Only	64	78	88	86	80	91	88	89	1	4	10
Truck/Minivan Only	16	2	2	—	1	2	—	1	74	64	45
Both Car & Truck/Minivan	20	20	10	14	19	7	12	10	25	32	45
CONSIDERED											
Domestic Only	36%	14%	29%	27%	57%	86%	51%	7%	39%	56%	35%
Import Only	15	26	15	15	9	—	13	37	10	5	7
Both	49	60	56	58	34	14	36	56	51	39	58
CONSIDERED USED MODEL	17%	26%	15%	14%	11%	7%	5%	12%	21%	14%	15%
BOUGHT											
Domestic	64%	35%	62%	45%	91%	100%	79%	21%	65%	99%	70%
Import	36	65	38	55	9	—	21	79	35	1	30
OWN OTHER VEHICLES	79%	74%	81%	77%	75%	75%	80%	81%	85%	91%	89%
Domestic Only	57	49	49	54	68	86	66	42	60	61	49
Import Only	21	25	24	21	15	2	14	23	22	22	23
Both	22	26	27	25	17	12	20	35	18	17	28
DECISION STATUS											
Had Help	58%	57%	45%	64%	64%	61%	56%	34%	45%	72%	55%
Solo Decision	42	43	55	36	36	39	44	66	55	28	45
NEW VEHICLE BUYER STATUS											
First-time Buyer	24%	47%	31%	19%	13%	4%	2%	12%	25%	8%	19%
Experienced Buyer	76	53	69	81	87	96	98	88	75	92	81

Table 23

New Vehicle Buyer Segments: Leisure-Time Activities

	Total Buyers	Sub-compact	Small Specialty	Compact	Mid-Size	Full-Size	Luxury	Sport Specialty	Compact Pick-Up	Compact Van	Compact Sport Utility
SPORTS & RECREATION											
Exercise/jog/bowl active sports	57%	57%	66%	60%	53%	50%	59%	76%	44%	54%	68%
Drive for pleasure	54	50	67	51	49	63	53	70	62	48	60
Attend sporting event	31	29	35	32	26	30	31	42	35	37	34
Go to beach or lake	29	26	44	24	23	27	21	40	37	25	40
Fishing/hunting	21	14	21	14	21	30	16	19	37	25	28
Boating/sailing	14	10	23	10	12	23	15	21	16	14	23
Camping or hiking	13	12	17	9	11	11	5	11	21	16	16
ARTS & ENTERTAINMENT											
Go to a movie	45%	53%	58%	44%	38%	22%	31%	59%	47%	32%	45%
Attend plays/concerts	18	23	20	20	17	16	24	25	6	14	12
Play a musical instrument	9	11	14	7	11	7	7	9	5	6	7
Go to a museum	6	6	7	7	4	6	9	10	5	7	7
PERSONAL/HOME											
Do odd jobs home/yard	78%	71%	74%	77%	82%	84%	78%	73%	80%	89%	85%
Shop/browse in stores	76	78	80	79	79	73	66	71	68	74	74
Read a book	56	63	57	55	59	49	55	56	39	58	59
Work on a hobby	47	44	49	48	42	45	40	42	52	51	53
Garden	33	24	28	34	37	52	41	31	30	40	40
Cook special/gourmet meals	28	28	32	32	24	24	24	32	24	29	31
SOCIAL											
Eat out	90%	85%	93%	92%	91%	92%	94%	96%	87%	91%	92%
Visit friends/relatives	84	83	89	85	83	85	82	76	84	86	82
Entertain at home	56	53	53	60	55	64	62	53	49	63	59
Attend a meeting	45	42	47	44	52	48	60	47	30	59	42
Play card games	26	17	29	28	29	35	25	18	34	28	23
Base (N)	(1,827)	(156)	(168)	(199)	(233)	(214)	(183)	(159)	(148)	(208)	(159)

Table 24

New Vehicle Buyer Segments: Importance of Four Factors in Deciding When to Buy
(Ratings of "Extremely" or "Very" Important)

	Total Buyers	Subcompact	Small Specialty	Compact	Mid-Size	Full-Size	Luxury	Sport Specialty	Compact Pick-Up	Compact Van	Compact Sport Utility
Wanted a new vehicle (for better options, better performance, just wanted one, etc.)	57%	54%	65%	56%	51%	59%	63%	77%	63%	51%	61%
Old vehicle needed replacing (due to repairs, damage, age, etc.)	50	76	49	51	43	23	20	27	40	39	40
Attracted by a special deal (such as low cost, financing, rebates, incentives, etc.)	30	38	27	25	31	28	16	21	33	21	23
Needed an additional vehicle for work or family	27	35	25	26	19	10	9	7	35	31	22

Question: How important were each of the following in your decision to buy a new vehicle at the particular time you did?

Table 25

New Vehicle Buyer Segments: Importance of Fourteen Factors in Choice of Make and Model
(Ratings of "Extremely" or "Very" Important)

	Total Buyers	Subcompact	Small Specialty	Compact	Mid-Size	Full-Size	Luxury	Sport Specialty	Compact Pick-Up	Compact Van	Compact Sport Utility
Reliability	88%	91%	85%	93%	85%	90%	92%	83%	83%	85%	85%
Manufacturer's reputation	78	84	76	85	76	76	84	80	74	70	67
Interior comfort and roominess	74	65	62	77	84	94	89	59	65	92	73
Low maintenance costs	71	82	64	76	64	68	49	48	76	66	59
Favorable product reviews	69	75	70	76	67	62	64	72	61	72	58
Price or deal offered	68	74	64	63	71	71	59	48	69	66	59
Attractive exterior styling	67	55	90	66	72	79	84	95	60	57	65
Versatility of vehicle	62	62	45	58	53	58	57	29	69	88	80
Availability of parts and service	59	61	55	64	60	69	63	55	56	52	48
Overall exterior size	54	45	45	57	59	81	70	31	48	65	57
Favorable experience with make	53	50	60	64	51	67	66	56	48	46	42
Interest rates/ credit terms	39	51	38	38	35	18	14	27	44	35	37
Rebates/dealer incentives	37	40	34	29	44	31	14	10	46	26	36
Recommendation of friend/relative	28	41	23	33	23	15	18	23	20	30	17

Question: How important were the following factors in deciding to buy the specific make and model of new vehicle that you did?

Table 26

New Vehicle Buyer Segments: Importance of Nine Factors in Choosing a Dealer
(Ratings of "Extremely" or "Very" Important)

	Total Buyers	Sub-compact	Small Specialty	Compact	Mid-Size	Full-Size	Luxury	Sport Specialty	Compact Pick-Up	Compact Van	Compact Sport Utility
Price or deal offered	81%	82%	78%	82%	83%	82%	77%	72%	80%	81%	75%
Desired vehicle in stock	76	77	74	77	78	71	69	69	78	69	76
Quality of sales staff	62	65	59	62	64	72	69	56	64	52	45
Dealer's reputation	59	60	53	65	67	72	68	49	57	52	36
Convenient dealer location	50	46	47	56	52	57	50	41	53	46	48
Trade-in allowance offered	46	44	40	47	51	56	46	36	48	48	36
Size of dealer's inventory	40	40	41	34	44	40	42	35	40	44	39
Previous experience with dealer	35	26	34	45	36	52	46	28	33	30	30
Recommendation of friends/relatives	29	39	27	30	26	23	24	23	24	14	29

Question: How important were each of the following in choosing the dealership from which you finally bought your new vehicle?

Table 27

New Vehicle Buyer Segments: Information Sources for Shopping
(Percent Who Used)

	Total Buyers	Subcompact	Small Specialty	Compact	Mid-Size	Full-Size	Luxury	Sport Specialty	Compact Pick-Up	Compact Van	Compact Sport Utility
Dealer's/manufacturers' printed materials	62%	57%	69%	57%	66%	56%	68%	69%	62%	69%	64%
Newspaper advertising	43	46	41	43	43	32	19	27	47	42	44
Magazine advertising	37	37	46	38	37	21	28	51	34	42	43
TV advertising	35	37	35	34	37	20	24	25	44	26	34
Auto trader/free car publications	17	19	18	15	19	13	12	24	19	17	16
Radio advertising	15	20	14	11	16	5	4	12	17	8	13
Outdoor advertising (billboards)	10	15	9	8	7	6	4	4	14	4	13

Question: When you were shopping for your new vehicle, did you get any information from...

Table 28

New Vehicle Buyer Segments: Ratings of Newspaper Automotive Classifieds
(Rated as "Very" or "Somewhat" Helpful)

	Total Buyers	Sub-compact	Small Specialty	Compact	Mid-Size	Full-Size	Luxury	Sport Specialty	Compact Pick-Up	Compact Van	Compact Sport Utility
Comparing the selection of vehicles offered by various dealers	67%	71%	66%	72%	68%	54%	47%	55%	73%	58%	60%
Comparing prices for the same model offered by various dealers	61	61	63	59	65	55	45	48	67	52	60
Comparing dealer locations	59	59	61	65	61	54	46	55	64	53	56
Estimating current value (trade-in) of vehicles you now own	56	[illegible]	58	63	54	50	50	59	55	56	56
Comparing incentives (rebates, discounts, etc.)	56	58	53	52	67	45	28	42	68	43	52
Comparing options on specific vehicles offered by various dealers	49	48	44	57	52	48	34	37	55	36	48
Comparing availability of specific vehicles/options at various dealers	47	40	46	54	50	50	36	35	57	39	46
Comparing finance terms (down payments, monthly payments, etc.)	40	48	36	38	39	23	20	33	49	34	40

Table 29

New Vehicle Buyer Segments: Attention-Getting Features of Newspaper Ads
(Ratings of "Extremely" or "Very" Important)

	Total Buyers	Subcompact	Small Specialty	Compact	Mid-Size	Full-Size	Luxury	Sport Specialty	Compact Pick-Up	Compact Van	Compact Sport Utility
Price information	58%	68%	58%	59%	54%	40%	42%	44%	61%	58%	52%
Manufacturer/dealer warranties	54	53	49	59	53	48	50	41	66	51	44
Specific make and model in ad	50	52	56	55	49	34	37	49	53	50	43
Particular options	44	37	49	44	47	42	41	37	51	46	42
Rebate or incentive information	35	39	33	32	42	29	19	23	41	28	29
Monthly payment information	32	45	30	30	25	10	15	19	45	24	25
Pictures of cars or trucks	31	26	40	31	29	26	27	32	42	24	27
Dealer financing information	30	40	29	29	25	15	14	20	41	22	21
Limited-time sale	23	20	22	25	21	20	15	16	32	21	22
Specific dealer name and logo	23	25	19	34	20	25	25	19	22	16	14

Question: In attracting your attention to a newspaper car or truck ad, how important were the features listed below?

V. New Vehicle Buyers' Study: Marketing Implications

Here are some key marketing implications flowing from our analysis of new vehicle buyers:

1. Women are the primary decision-makers for 40% of all new vehicle sales, and are involved in a great many more. While manufacturers and dealers are fully aware of the growing impact of women in the automotive marketplace, this study provided no evidence of a need to develop separate advertising campaigns for men and women, particularly at the dealer level. Men and women generally have the same order of priorities in selecting new vehicles and dealers. Women's greater concerns about financial issues appear to be realistically related to the more limited amounts of money they have to spend.

2. The brief shopping period during which most new vehicle buyers are active, and the strong tendency toward all-week shopping and reliance on the daily newspaper during the shopping period indicate that continuity of advertising in newspapers is essential. Flighting of ads will miss buyers entirely during hiatus periods, and will gain little additional reach. Individual dealers and dealer associations can make better use of the daily newspaper's ability to reach the vast majority of buyers of all types of vehicles through detailed, collaborative study of prospects in individual markets.

3. New vehicle buyers most frequently turn to newspapers when they are seeking information about which dealers to visit, and a substantial minority (35%) of all buyers are willing to travel across a wide area to find the best deal on a new car or truck. To compete for these buyers, dealers would be well-advised to advertise to the entire market, and not limit their campaigns to more narrowly-targeted geographic areas or zones.

4. New vehicle buyers seek specific types of information in newspaper classified advertising. Price, warranties, and the particular models a dealer has in stock are minimum requirements for an attention-getting ad. Financial information (such as monthly payments and financing) will increase attention to ads among buyers of cars in the lower price classification or in segments where competition is strong. Information about available options are particularly attractive to small specialty and sport specialty car buyers. Any limited-time "sale" claims should be supported by solid price information.

5. Layouts should be clean and focus the potential buyer's attention on information needed to evaluate a dealer or type of vehicle. While pictures of cars were rated as less attention-getting than "deal" information (price, warranty, and so on), many people may not evaluate pictures (when questioned) as highly as they would if confronted with specific classified ads with and without pictures. In any case, poorly-rendered visual images of cars or trucks leave too much to the imagination, and are not likely to build an ad's (or the dealer's) credibility in the minds of prospective buyers.

6. Opportunities to advertise in special automotive sections should be utilized whenever possible, as the vast majority of new vehicle buyers read them with some regularity.

7. Interest in new vehicles persists even after a purchase: 44% of recent buyers still read or browse the automotive classified ads in their local daily newspaper. A few are already planning to make another purchase. Thus, automotive classified advertising in newspapers builds dealer recognition and brand image among potential new vehicle buyers and reinforces them among those who have just bought a vehicle or who may do so soon again.

APPENDIX

Table A.1

January 1988 Sales and Sample Weighting

	January '88 Sales/Regist. (Restricted States)		January '88 Sales/Regist. (Non-restricted States)		Total January 1988 Sales/Regist.		Question-naires Sent	Returns	Weight-ing Used
	No.	%	No.	%	No.	%	No.	No.	
Subcompact	28,382	22.29	90,253	22.54	118,635	22.50	500	159	746.13
Small Specialty	11,097	8.71	35,270	8.81	46,367	8.79	500	171	271.15
Compact	21,353	16.77	63,106	15.76	84,459	16.01	500	202	418.11
Mid-size	23,094	18.14	71,843	17.94	94,937	17.99	500	234	405.71
Full Size	5,118	4.02	18,166	4.54	23,284	4.41	500	221	105.36
Luxury	4,485	3.52	15,799	3.95	20,284	3.84	500	188	107.89
Sport Specialty	824	0.65	3,151	0.79	3,975	0.75	500	161	24.69
Compact Pickup	14,762	11.59	52,319	13.07	67,081	12.71	500	150	447.21
Compact Van	8,161	6.41	22,627	5.65	30,788	5.83	500	215	143.20
Compact Sport Utility	10,057	7.90	27,828	6.95	37,885	7.17	500	162	233.86
Totals	127,333	100%	400,362	100%	527,695	100%	5,000	1,863	

Table A.2

Vehicle Classifications

SUBCOMPACT	SMALL SPECIALTY	COMPACT	MID-SIZE
Ford Escort	Chevrolet Beretta	Dodge Aries	Plymouth Caravelle
Ford Escort GT	Chevrolet Camaro	Chevrolet Cavalier	Chevrolet Celebrity
Plymouth Horizon	Dodge Daytona	Chevrolet Corsica	Buick Century
Chevrolet Nova	Ford Escort EXP	Eagle	Olds. Cutlass Calais
Dodge Omni	Pontiac Fiero	Oldsmobile Firenza	Olds. Cutlass Ciera
Daihatsu Charade	Pontiac Firebird	Plymouth Reliant	Dodge 600
Honda Civic STD/Hatch	Ford Mustang	Dodge Shadow	Pontiac Grand Am
Dodge Colt	Toyota Celica	Buick Skyhawk	Dodge Lancer
Plymouth Colt	Mitsubishi Cordia	Pontiac Sunbird	Chrysler LeBaron 4-Dr/Wagon
Toyota Corolla	Toyota Corolla SR-5/GT-S	Plymouth Sundance	LeBaron GTS
Hyundai Excel	Honda CRX	Ford Tempo	Pontiac 6000 STE
Ford Festiva	Isuzu Impulse	Mercury Topaz	Pontiac Bonneville
Volkswagen Fox	Mazda MX-6	Honda Accord	Cadillac Cimarron
Volkswagen Golf	Nissan 200SX	Toyota Camry	Olds. Delta 88 Royale
Isuzu I-Mark	Honda Prelude	Acura Integra	Dodge Dynasty
Subaru Justy	Nissan Pulsar NX	Volkswagen Jetta	Buick LeSabre
Pontiac LeMans	Volkswagen Scirocco	Mazda 626	Chrysler New Yorker
Mazda 232	Subaru XT	Eagle Medallion	Chrysler New Yorker Turbo
Mitsubishi Mirage	Toyota MR2	Nissan Stanza Sedan	Mercury Sable
Mitsubishi Precis	Volkswagen Cabriolet	Subaru Sedan	Ford Taurus
Nissan Sentra	Volkswagen GTi		Audi 80
Chevrolet Spectrum			Audi 90
Chevrolet Sprint			BMW 3-Series
Subaru Hatchback			Toyota Cressida
Toyota Tercel			Mitsubishi Galant Sigma
Mercury Tracer			Acura Legend Sedan
Yugo			Nissan Maxima
Honda Civic Wagon			Mazda 929
Nissan Stanza Sedan			Merkur XR4Ti
Subaru Wagon			Alfa Romeo Milano
Toyota Tercel Wagon			Peugeot 505
Dodge Colt Vista			Volkswagen Quantum
Plymouth Colt Vista			Saab 900 Series
			Sterling
			Volvo DL/GL
			Mercury Cougar
			Olds. Cutlass Supreme
			Chrysler LeBaron Coupe
			Buick Regal

Table A.2 (Continued)

Vehicle Classifications

FULL SIZE

Chevrolet Caprice
Dodge Diplomat
Buick Electra
Chrysler Fifth Avenue
Plymouth Gran Fury
Mercury Grand Marquis
Ford Crown Victoria
Olds. Ninety-Eight

SPORT SPECIALTY

Chevrolet Corvette
Chrysler Conquest
Mazda RX-7
Nissan 300ZX
Porsche 911
Porsche 924S
Porsche 928S4
Porsche 944
Mitsubishi Starion
Toyota Supra

LUXURY

Cadillac Allante
Cadillac Brougham
Cadillac DeVille/Fleetwood
Cadillac Eldorado
Lincoln Mark VII
Buick Riviera
Cadillac Seville
Olds. Toronado
Lincoln Town Car
Audi 5000
BMW 5 Series
Jaguar XJ-6
Jaguar XJ-S
Acura Legend Coupe
Mercedes 190 Class
Mercedes 300 Class
Mercedes 260E
Mercedes 420SEL
Mercedes 560SEL
Saab 9000
Merkur Scorpio
Volvo 760

COMPACT PICKUP

Jeep Comanche 2WD
Jeep Comanche 4WD
Dodge Ram 50 2WD
Dodge Power Ram 4WD
Dodge Dakota 2WD
Dodge Dakota 4WD
Ford Ranger 2WD
Ford Ranger 4WD
Chevrolet S10/GMC S15 2WD
Chevrolet S10/GMC S15 4WD
Isuzu Pickup 2WD
Isuzu Pickup 4WD
Mazda Pickup 2WD
Mazda Pickup 4WD
Mitsubishi Pickup 2WD
Mitsubishi Pickup 4WD
Nissan Pickup 2WD
Nissan Pickup 4WD
Toyota Pickup 2WD
Toyota Pickup 4WD

COMPACT VAN

Dodge Caravan/Grand Caravan
Plymouth Voyager/
  Grand Voyager
Ford Aerostar Wagon
Chevrolet Astro/Safari
Nissan Van
Mitsubishi Wagon
Toyota Van Wagon
Volkswagen Vanagon

COMPACT SPORT UTILITY

Jeep Wrangler
Jeep Cherokee 2WD
Jeep Cherokee 4WD
Jeep Wagoneer
Dodge Raider
Ford Bronco II 2WD
Ford Bronco II 4WD
Chev. Blazer/GMC Jimmy 2WD
Chev. Blazer/GMC Jimmy 4WD
Isuzu Trooper II
Mitsubishi Montero
Nissan Pathfinder
Range Rover
Suzuki Samurai
Toyota 4Runner
Toyota Land Cruiser

Table A.3

Choice of a Domestic or Import Vehicle by Demographics

	Domestic	Import
TOTAL BUYERS	64%	36%
SEX		
Male	70	30
Female	56	44
MARITAL STATUS		
Married Men	70	30
Married Women	59	41
Single Men	57	43
Single Women	49	51
Divorced/Separated/Widowed	62	38
EDUCATION		
Not High School Graduate	86	14
High School Graduate	70	30
Some College/Technical School	68	32
College Graduate	53	47
Graduate Work/Degree	54	46
AGE		
Under 25	54	46
25-34	49	51
35-44	68	32
45-54	68	32
55-64	75	25
65+	91	9
INCOME		
Less than $25,000	68	32
$25-34,999	60	40
$35-44,999	64	36
$45-59,999	69	31
$60-99,999	56	44
$100,000+	68	32
NEW VEHICLE BUYER STATUS		
First-time Buyer	49	51
Experienced Buyer	69	31
MARKET SIZE		
A Counties	56	44
B Counties	65	35
C Counties	72	28
D Counties	76	24

Table A.4

Base Numbers Used in this Report

	All Buyers
TOTAL	1,863
SEX	
Male	1,119
Female	620
MARITAL STATUS	
Total married	1,230
Total single	282
Divorced/separated/widowed	222
Married men	887
Married women	343
Single men	154
Single women	128
AGE	
Under 25	146
25-34	424
35-44	411
45-54	279
55-64	233
65+	254
EDUCATION	
Not High School Graduate	108
High School Graduate	458
Some College/Technical School	462
College Graduate	294
Graduate Work/Degree	418
INCOME	
Less than $25,000	231
$25-34,999	243
$35-44,999	249
$45-59,999	282
$60-99,999	335
$100,000+	189
DECISION STATUS	
Had Help	1,047
Solo Decision	804
NEW VEHICLE BUYER STATUS	
First-time Buyer	310
Experienced Buyer	1,530
TYPE OF VEHICLE	
Domestic	1,293
Import	570